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handbook of CUMULATIVE RECORDS

Bulletin 1944, Number 5

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HANDBOOK OF CUMULATIVE RECORDS

*A Report of the National Committee
on Cumulative Records*

Bulletin 1944, No. 5

[This is the last bulletin of the 1944 series]

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FOREWORD

THE impact of war has shown the need for cumulative records by its sudden demands for the training and placement of teen-age persons. Actually, need for such records has been there all the time. During war-times the need for information about large numbers of persons is immediate and the best condition to satisfy such a need is the cumulative record. This is because of the nature of the cumulative record, which by definition and by the best practices is a record of all the facts about pupils considered significant by the school, recorded over a period of time. If the facts recorded are valid indicators of the pupil's traits, these facts establish growth curves which are the best predictors of attainment in the future.

If valid records have been kept for a period of time, no costly check-up regarding a pupil's traits is necessary when an emergency arises. It is costly to ascertain at any particular time, when cumulative records are not available, what traits pupils possess because of the special tests that need to be given and the special personnel needed.

The savings both to the school and to the individual in good guidance need not be discussed here. What does need to be emphasized both for schools having cumulative record systems and those which do not have them is that such records, well kept, are necessary tools in good guidance and therefore rate high priority in regard to the expenditure of school funds.

The National Committee on Cumulative Records appointed by the U. S. Office of Education and functioning under the chairmanship of Dr. David Segel has prepared this bulletin on the basis of its experience with the use of cumulative records in schools, the review of literature on the subject, and two conferences of the committee called by the U. S. Office of Education.

The National Committee and the U. S. Office of Education desire to acknowledge the helpful advice at various stages of this study of Dr. Thomas Woofter, Jr., Director of Research, Federal Security Agency; Roy O. Billett, Professor of Education, Boston University; Edward A. Rundquist, Assistant Director, Department of Psychological Services, Cincinnati Public Schools; and Frank Lorimer, Professor of Population, American University.

BESS GOODYKOONTZ
Assistant U. S. Commissioner of Education

INTRODUCTION

THE National Committee on Cumulative Records was set the task of developing a handbook to show the place of the cumulative record in administration, instructional activities, and pupil personnel work of our schools. Committee members were asked to set down good practices in using cumulative records both from the standpoint of actual known practices in schools and from pertinent results obtained from research. The U. S. Office of Education made a Nation-wide survey of the types of cumulative record systems used, with the use of cumulative records. The results of this national survey and the general recommendations regarding the items which school systems might find useful in their cumulative records are given in chapter I.

The general principles which justify the keeping of cumulative records are discussed in chapter II. This chapter which is based on the actual installation of a system of records in our largest school system is written especially for the principal or superintendent as an orientation to the problem of cumulative record keeping. Chapter III tells of the specific uses of cumulative records for the elementary school, and, similarly, chapter IV does this for the high school. Chapter V deals with the problem of the use of test scores and explores the relation between the test program and the cumulative record. Chapter VI takes up the important area of reading and shows how the records in this subject may be used to great advantage in the instructional program as well as in educational guidance. The use of records in advising with parents is discussed in chapter VII. Individual case work methods with children have been developed, but the day-by-day relationships between the school and parents have never been adequately clarified. This chapter deals with the fundamentals of this situation through the use of the child's achievements, aptitudes, and behavior. As such, it should be of special interest to all workers who deal with parents at one time or another. Chapter VIII deals with the follow-up of students leaving school or graduating from school, a field that has been inadequately developed. The possibilities of guidance after the student has left school should be cultivated. Follow-up records are also a good means by which the school can evaluate its own activities. Records of the placement of students in jobs are discussed in chapter IX. This is timely as it includes the summary record now desired by the Selective Service system. Chapter X contains descriptions of two types of unique uses of cumulative records. These are included in order to show the wide variety of possibilities of the use of these records. In the Appendix illustrations of several cumulative record blanks are given.

CHAPTER I

Occurrence of Items in Cumulative Records in Use in the United States

By DAVID SEGEL

IN THIS section are presented the first comprehensive statistics concerning types of items found on the cumulative records of the country. The two previous studies of the U. S. Office of Education in this area dealt with selected samplings. One of them was a study of the records used in 177 school systems.¹ The other study was made on the secondary school level only and in those schools which had counselors.² The study presented in this section deals with the results of an inquiry sent to all school systems in the country in cities of 2,500 or over and to all county superintendents of schools.

Table I gives the number of school systems in the different sections of the country and the number reporting cumulative records. Only a few school systems not having cumulative record systems made a report, so that the number reporting cumulative records is practically the same as the number of school systems responding. Of the 1,230 cities reporting cumulative records, 472 had a combined elementary and secondary school record, while the other 758 cities reported 729 separate elementary record systems and 746 separate secondary record systems. Thus, these cities reported upon 1,947 cumulative record systems. Of the 544 counties reporting cumulative records, 169 counties reported a combined elementary and secondary record, while the other 375 counties reported 244 separate elementary record systems and 155 separate secondary record systems. Thus, these counties reported upon 568 cumulative record systems.

The 1,230 cities and 544 counties reported, therefore, on a total of 2,515 cumulative record systems. From the fact that 41 percent of the cities and 18 percent of rural school systems used these cumulative

¹ Nature and use of the cumulative record. (U. S. Office of Education, Bulletin, 1938, No. 3.)

² The individual inventory in guidance programs in secondary schools. (U. S. Office of Education, Vocational Division Bulletin No. 215.)

records, the writer would estimate that at least 30 percent of the public elementary and secondary schools of the country, or nearly 69,000 schools, make use of cumulative records.

The statistics regarding the records used, given in tables II to XII, are based on a random sampling of the records made by taking every third one in an alphabetical list arranged for each State.

TABLE I.—Number and percent of city and county school systems using cumulative record systems in some segment of their school system

Region	Number of cities	Number of cities reporting cumulative records	Percent of cities reporting cumulative records	Number of counties	Number of counties reporting cumulative records	Percent of counties reporting cumulative records
1	2	3	4	5	6	7
East.....	971	427	44	244	97	40
South.....	623	200	32	1,186	113	10
East Central.....	778	302	39	611	163	27
West Central.....	317	148	47	621	71	11
West.....	339	153	45	410	100	24
Total.....	3,028	1,230	41	3,072	544	18

TABLE II.—Occurrence of personal items in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Date of birth.....	35	61	62	54	50	57	76	63	56
Evidence of date of birth.....	55	34	23	37	41	24	17	25	34
Place of birth.....	80	64	66	69	78	66	53	64	68
Sex.....	73	47	40	53	59	39	35	43	51
Color or race.....	55	49	34	47	39	23	15	24	42
Residence of pupil or parents.....	92	91	83	89	89	87	85	86	88
Religious affiliation.....	31	12	9	17	14	7	10	10	15

OCCURRENCE OF ITEMS

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TABLE III.—Occurrence of scholarship items in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
School marks.....	92	87	83	87	83	80	92	85	86
Special reports on failed or dropped courses:									
Without reasons.....	8	4	9	6	1	4	5	4	6
With reasons.....	24	34	15	26	33	37	16	28	26
Rank in graduating class:									
With number in class.....	26	5	28	17	50	2	38	27	19
Without number in class.....	6		11	5	7		11	6	5
Average mark.....	6	6		4			6	4	4
Quartile mark.....	2			1	2		3	2	1
Record of reading.....	14	8	21	13	5	5	9	6	11

TABLE IV.—Occurrence of items concerning parents in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Name of parents or guardian:									
Father and mother.....	61	46	19	43	53	29	24	33	41
Father only or name of "parent or legal guardian".....	39	50	53	45	37	61	47	50	46
Total name of parents or guardian.....	90	96	72	88	90	90	71	83	87
Occupation of parents.....	39	45	23	37	29	23	23	24	34
Occupation of parents or guardians.....	41	34	40	38	44	50	44	46	40
Occupation of father only.....	4		4	2	5	1	2	2	2
Total occupation of parents.....	84	79	67	77	78	74	69	72	76
Nationality or national stock of parents.....	51	39	36	42	53	28	28	34	41
Citizenship.....	2	22	2	11	6	8	7	7	10
Marital status.....	27	20	9	19	18	9	8	11	17
Education.....	24	22	13	20	14	5	7	8	17
Health.....	2	7		4	4	3	4	4	4
Birthplace.....	43	31	9	29	23	21	16	20	27
Alive or deceased.....	31	55	30	41	34	17	20	24	37

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TABLE V.—Occurrence of items regarding siblings in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Data on number of siblings:									
Number of siblings only.....	4	11	9	8	8	4	8	6	7
Number of siblings, older and younger.....	24	12	11	15	10	5	9	7	13
Siblings listed in order by age.....	2	8	-----	4	1	2	2	2	3
Number of children in family.....	10	7	2	6	1	6	3	4	6
Total data on number of siblings.....	40	38	22	35	20	17	22	19	32
Occupation of siblings.....	-----	-----	-----	-----	5	2	4	3	1
Education of siblings.....	2	7	-----	4	5	2	3	3	4

TABLE VI.—Occurrence of items regarding the home environment

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Ratings of home influence, home advantages, conditions, economic status, etc.....	43	30	21	31	34	22	20	26	30
Language or languages spoken in the home.....	51	30	11	31	41	18	13	22	29
Whom pupil lives with.....	37	18	9	23	18	10	10	12	21
Contacts with social agencies.....	-----	-----	-----	-----	1	2	1	1	1

OCCURRENCE OF ITEMS

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TABLE VII.—Occurrence of items relating to test scores and ratings in cumulative records¹

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Test Scores, no particular type specified.....	26	11	13	16	38	16	26	25	18
Intelligence Test scores.....	43	42	56	46	45	42	42	43	45
Aptitude Test scores.....	22	-----	2	7	8	1	2	3	6
Personality Test scores.....	-----	1	2	1	1	1	3	2	1
Personality, citizenship, and habit ratings.....	75	64	62	66	71	45	54	55	64

¹ Except ratings of the home environments which are given in Table VI.

TABLE VIII.—Occurrence of items regarding health in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Simple rating of health by teacher and pupil.....	29	41	40	38	51	46	30	41	39
Complete health record to be filled in by physician or school nurse.....	41	38	9	31	43	24	11	20	28
Record of physical disabilities.....	43	51	28	42	53	26	18	29	39
Vaccination record.....	73	68	40	62	60	58	19	44	54
Disease census.....	51	49	23	42	43	32	14	28	39

TABLE IX.—Occurrence of items regarding attendance in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
School attendance, days present or absent.....	88	87	66	81	82	87	74	81	81
Records of schools attended.....	18	28	9	20	18	17	11	15	19
Last school or school from which transferred.....	26	23	45	30	48	37	46	43	33
Entrance and withdrawal record (dates only).....	4	23	26	18	13	25	27	23	17
Dates with reasons or other information.....	67	41	55	53	55	43	43	46	52
Entrance record only.....	6	3	4	4	4	6	8	6	4
Total entrance and withdrawal record.....	77	67	85	75	72	74	78	75	75

TABLE X.—Occurrence of items on extracurricular activities, vocational plans and experiences, both during school and after leaving school in cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Out of school activities.....	14	10	26	15	18	10	14	13	14
Employment record during school years.....	39	4	32	22	29	6	17	16	20
Educational plans.....	10	5	40	16	21	3	24	16	16
Vocational plans.....	12	4	40	16	22	3	26	17	16
Follow-up record: Later education and occupations.....	6	3	17	6	23	1	16	12	7
Later education only.....	4	10	11	5	5	2	11	6	5
Occupation only.....				4	2	1	2	2	4
Other or not specified.....			4	1	2	1	4	2	1
Total follow-up record items.....	10	13	32	16	32	5	33	22	17

TABLE XI.—Occurrence of miscellaneous items in the cumulative records

Item	Percent								
	In city schools				In county schools				All schools
	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	Elementary and secondary school records combined	Elementary school records	Secondary school records	All records	
1	2	3	4	5	6	7	8	9	10
Photographs.....	4	3	30	11	19	5	16	12	11
Counselor's notes.....	57	58	72	62	64	55	52	56	61
Conduct or deportment rating (separate from personality rating).....	53	53	36	48	34	57	27	41	46

TABLE XII.—Types of cumulative records in use in school systems

TYPE Form	PERCENTAGE OF ALL CUMULATIVE RECORDS	TYPE Size	PERCENTAGE OF ALL CUMULATIVE RECORDS
One card only.....	56	5 by 8 inches.....	34
Folder only.....	18	8½ by 11 inches.....	19
Loose-leaf (1 page).....	15	9½ by 12 inches.....	10
2 cards.....	5	6 by 4 inches.....	8
Others.....	6	Other sizes.....	29

Occurrence of the items on the cumulative records of the country shows more clearly than any other data the importance which school systems believe those items of information have in the instruction and guidance of pupils. It follows, therefore, that the data should be used as one index of value in recommending items for the cumulative record.

As a guide to school systems in developing cumulative record forms, a list of items which should be considered for inclusion on the form has been prepared. This list consists of items recommended by members of the National Committee on Cumulative Records and examined in the light of the actual occurrence in the cumulative records now in use, as shown in the preceding tables.

It should be understood that not all of these items are recommended for use by all school systems. The cumulative record is a tool which should be adjusted to fit the individual school system. Only those items should be put into cumulative records which a school system believes it can use. For example, before a school system inaugurates a cumulative record system which emphasizes the recording of test scores, it should have not only plans for a testing program, but also teachers and counselors who have an understanding of the use of the test results which will make it worth while for the school system to maintain the test records in the cumulative record. The installation of an elaborate cumulative record system is too costly to be undertaken

without serious consideration being given to the adequate use and efficient maintenance of the records.

Chapters which follow describe the uses of cumulative records. Insofar as a school system is prepared to use records as described herein, so far should necessary items of information be found in its cumulative record forms.

For some school systems some of the items listed below might involve a great many more detailed items. This is especially true of the health record and of the follow-up record after leaving school. Incidentally, items listed below provide for the collection of all the information needed for the *Educational Experience Summary*, a form which has been developed by a joint committee of the U. S. Office of Education, the War Department, and the War Manpower Commission, for the purpose of obtaining information for counseling boys who are graduating from high school and are about to enter the armed forces.³

Classified by broad categories, the items recommended by the Committee are as follows:

Personal

Name	Sex
Date of birth	Color or race
Evidence of birth	Residence of pupil and/or parents
Place of birth	

Home and Community

Names of parents or guardians	With whom does pupil live
Occupation of parents or guardians	Birthplace of parents
	Language spoken in home
Are parents alive or deceased	Marital status
Ratings of home environment and/or economic status	Number of siblings, older and younger

Scholarship

School marks by years and subject	Rank in graduating class (with number in class)
Special reports on failures	
Record of reading	

Test scores and ratings⁴

General intelligence test scores
Achievement test scores
Other test scores
Personality ratings

School attendance

Days present or absent each year
Record of schools attended, with dates

³ The record card and directions for the Educational Experience Summary may be obtained by schools from the State Departments of Education.

⁴ As pointed out in Chapter V the cumulative record should be tailored as closely as possible to the testing program planned for a school system. The type of record should therefore be planned with the principles given in that chapter in mind.

Health

The following types of items are desirable if a school has a health program in which physicians and nurses are a part:

- Complete health record, to be filled in by physician or nurse
- Record of physical disabilities
- Vaccination record
- Disease census

If a physician or nurse is not available for examining school children a rating of the health of pupils may be made by the teachers, the type of rating depending upon the extent of the education of teachers in health matters. For suggestions regarding detailed items see the cumulative record forms given in the Appendix.

Anecdotal records

If an anecdotal records system is to be used, a special form should be developed. Anecdotal reports may be kept easily if filed in a folding type of cumulative record or where records are kept in envelopes.

Miscellaneous

- Employment record during school years
- Vocational plans
- Counselor's notes
- Extracurricular activities
- Follow-up record after leaving school (Employment and further education)^{*}
- Space for notations by teachers and others

^{*} Special forms for follow-up purposes are given in chapter VIII.

CHAPTER II

Development of a Cumulative Record System

By WENDELL C. ALLEN

COMPLEXITY in education as well as in the lives of individuals points to the need of gathering together and maintaining in a form conducive to constructive use those facts about each person in school which will, when reviewed, give a reasonably well-rounded and correct impression of his personal development. For this purpose, a cumulative record is necessary. Its form and the nature and volume of its content may be different at each educational level. The specific purposes for which it is used will vary from year to year and from school to school, but the basic purpose of the record, its use as a tool in promoting an individual's fullest development as a responsible member of society, remains constant. Thus viewed, the cumulative record is an expression of the educational philosophy of a school. Its content and use indicate the things which a school staff consider to be important.

This cumulative and permanent school record of student progress must be, therefore, much more than an instrument for official pupil accounting. It must facilitate the coordination of all the personnel activities carried on by a school staff and by agencies that work with students after they have left school. It must present a picture of student development of variety and depth and be a result of a study of the individual as well as a means of studying him.

Cumulative Record Defined

The cumulative record is defined as a record of information concerned with the appraisal of the individual pupil—usually kept on a card, sheet, folder, cards in an envelope, or some combination of such—kept in one place. Other records of the school system may be used in developing the cumulative record and may duplicate materials in the cumulative record. This is true, for example, for scholastic records which might be kept by department heads and/or registrars in secondary schools for special use in connection with determining and recording credits and for checking on the progress made by pupils for subsequent work.

Features of an Ideal Cumulative Record System

The ideal cumulative record system in a given school is one which:

1. Presents those facts and impressions which staff members consider to be most significant in revealing and shaping the development of students.
2. Clearly indicates the trends of growth and the potential strengths and weaknesses of students.
3. Builds up information on each area of a student's experience and development over a period of years.
4. Presents information so clearly that a new counselor, principal, or teacher can read and understand the record without difficulty.
5. Is used by all staff members as an aid in their daily work with students.
6. Requires no more clerical work than can be justified by its practical use.
7. In form and content is developed and constantly improved through the cooperation, study, and experimentation of all staff members.

Suggestions For Form in Relation to Use of Records

Although it is best for each school or school system to develop its own record system, the process should include study of the experience of other schools and of the valuable contributions to progress in this area that have been made by various committees and organizations. Many different types of record cards have been developed and are available for inspection and use. State departments of education usually maintain files of record materials or can tell schools where they may be obtained. The U. S. Office of Education will advise schools as to the work being done on records throughout the country and can provide samples of record materials.

Without attempting to suggest the exact form or arrangement of a cumulative record card or the details governing the organization and use of the cumulative record system the following suggestions are offered:

1. Allow sufficient space on the record card for comments and summary statements.
2. Note on the cumulative record card the location of additional data of value which may be too confidential or too voluminous for record entry.
3. Make record entries so that they will be meaningful. Incomplete information may be of no value to the user. For example, results of standardized tests should be entered in sufficiently complete form to enable the user to evaluate the significance of the record.
4. Stock only sufficient cards for 1 year's use. This will make the process of revision easier. The color of cards and their organization and spacing should be such as to minimize eye strain. Buff colored cards are to be preferred. Paper stock should be both flexible and durable.

5. See that the arrangement, designation, spacing, and printing of items on a card are such that:
 - (a) Data which are cumulative can be presented in time sequence.
 - (b) Entries can be made large enough to be read easily.
 - (c) The nature of each item is clear.
 - (d) Trends in student development may be readily discerned.
6. Include data that is useful to the school staff in daily work with students. Include as much of the additional data that is ideally to be desired as time and clerical assistance will permit. Include data which is needed by employers, social agencies, and other schools.
7. Keep an inventory of all records in addition to the basic card. Note the content, functions, and procedures for maintenance of each type. Discontinue records no longer needed.
8. Arrange all record-keeping facilities so that the advisory and teaching staff can have direct and easy access to record data.

Many schools have adopted a record system or a new record card which they consider as ideal or nearly so only to discover that it does not function as they had hoped. For example, a staff may agree that it is desirable to have a record of students' employment outside of school hours and later find that the time and work involved to obtain a useful record of this experience is more than can be allotted. To accuse students of providing inaccurate information or employers of being uncooperative does not improve the situation. It is as necessary for a school staff to organize the procedures for assembling and recording information as to decide upon the facts they want to have as a part of the record.

The ideal record in any school situation will be one which develops as the result of a realistic approach to the problem of records. Drawing upon the experience of other schools and the work of the various record committees of educational organizations will help a school staff analyze its own situation and problems. Through an experimental, practical approach looking toward the ideal a school staff can gradually develop a record system which will be useful to the staff and to the community in working with students.¹

The basic cumulative record should be kept where it can be easily consulted by those who have the most use for the records. If there is a central counseling system in the school, the records should, of course, be made convenient for the personnel in that counseling system. In schools in which teachers are the main users of the records a decentralized system, i. e., each classroom or homeroom keeping its records, is best. Unfortunately, especially in larger schools, administrative

¹Problems involved in such an approach are considered in the following reference: Allen, Wendell C., *Cumulative Pupil Records*, Bureau of Publications, Teachers College, Columbia University, New York, N. Y., 1943.

considerations usually make it advisable to place the record in a central location rather than in the hands of the classroom teacher, home-room adviser, or other person who assumes responsibility for the guidance of students. Specific regulations covering the use of records are necessary in such circumstances, but there is no real justification for keeping records locked and requiring teachers to request the key before they can be used. Nothing is more certain to discourage the kind of record use which is desired than the assumption on an administrator's part that his teachers cannot be trusted to observe professional standards. It is necessary, on occasion, it is true, to place certain information about students in a confidential file in order to insure its proper use. Records in general, however, should be used freely by all staff members. In this, as in every phase of education, certain risks must be taken in order to secure widespread constructive use of record data by most of the school staff.

Sources of Cumulative Record Data

Data may be obtained in various ways and from different sources. In one-teacher schools and in schools without supervising principals, the data are largely a matter for the individual teacher to secure. In schools having counselors, visiting teachers, principals, and registrars' offices, much of the data on the cumulative record may be obtained through or directly from such personnel. The following exposition of sources is written from the standpoint of schools in which there are such specialized professional and administrative officials as those mentioned.

Personal home and community items with possibly one exception may be obtained by teachers and counselors directly from pupils or from parents, if the pupils are in the kindergarten and primary grades. The method of obtaining ratings of home environment and economic status, however, depends somewhat on the type of information desired and the accuracy with which it is desired. Home visitation by a counselor or a visiting teacher is necessary to obtain accurate data on these items. Data on the other items of home and community for pupils in the upper grades and high school may be obtained through the use of a mimeographed form filled in by pupils.

Scholarship information may be copied from teachers' reports commonly required by administrative offices in the form of class lists. If such reports are not required, this information may be entered on the cumulative record directly from teachers' class record books.

Standardized test scores and ratings may be recorded on cumulative records directly from tests or rating papers or from lists of results made up by teachers or others who have scored test papers or ratings.

School attendance data may be obtained from the official school records kept on attendance. The summary of days present or absent during each year should be added to the cumulative record once a year.

Health.—In schools in which pupils are examined by a physician or nurse, such persons may use their own forms from which the data for the cumulative records are later copied, or they may mark directly onto the cumulative record. When teachers rate pupils on health items, mimeographed forms can be used for such ratings and the data later transferred to the cumulative record, or teachers may fill in the cumulative health record directly, if this is preferred.

Anecdotal records.—Special forms used in recording anecdotes and notes written about pupils can be filed with the cumulative record. Such materials do not need to be copied onto a cumulative record card or other cumulative record.

Miscellaneous items.—Except for the follow-up record the data called for in the miscellaneous category (p. 9) will be recorded directly on the cumulative record form by clerk, teacher, or counselor. The follow-up data are obtained largely through correspondence and the data may be filed in their original state with the cumulative record, or a summary of it may be made on the cumulative record form.

Integration of Records in the Elementary and Secondary Schools

The organization of school systems sometimes makes it difficult to develop a record folder or card for use throughout the 12 or more years of school. In practice, it is often necessary to maintain separate cards at each level and to summarize information from elementary school records before they are sent to higher schools. However, if the school system is well integrated for guidance purposes a folder or card or cards for all 12 years will facilitate the articulation between school levels.

Minimizing the Mechanics of Record Keeping

The mechanics of record keeping often present difficulties to a school. In order to reduce such difficulties to a minimum it is important that all persons keeping the record know just what is expected of them. This is especially necessary when teachers perform the bulk of the clerical work involved. Nor should the volume of record data be out of proportion to its practical value. If the mechanical burden of record keeping is sufficiently light to allow time for the teacher to consider the significance of the data with which he is working and to be stimulated to further observation of students, there is every reason for teachers to use a reasonable portion of their time in recording

data. In this way the work becomes a teaching rather than a clerical function.

It is wise for a school system to summarize in a manual its record philosophy, suggestions for the use of record data, and its rules and regulations governing the mechanics of record keeping. It should include cases illustrating how teachers can interpret and use record data, and examples of record entries that are meaningful in interpreting student behavior. Flexible standards for record entries, such as for the expression of teachers' judgment of personal characteristics of students or of the significance of students' behavior as an indication of character traits, with specific suggestions of methods for teacher education in the use of record data, are also helpful additions.

CHAPTER III

Use of Records in the Elementary School

By ETHEL KAWIN

FROM many points of view, the most crucial period of adjustment for individuals is in the elementary school years. Later education and adjustments must be superimposed upon the foundations laid in the early and formative years of a child's life. Also, the greatest number of children can be reached during the so-called primary years, since more of them are attending school during those years than in either preschool or later periods. Cumulative records furnish the basis for adjustment at the elementary level as well as for guiding the pupil in his later school career.

SPECIAL INFORMATION IMPORTANT FOR THE USE OF CUMULATIVE RECORDS AT THE ELEMENTARY LEVEL

Family Background and Home Environment

No child can be understood without some knowledge of the family background from which he emerges and the home environment in which he lives. It is generally recognized in modern psychology and mental hygiene that the child's earliest experiences in the family and the home are outstanding factors in determining his personality and behavior. Although the influences of family relationships are exerted most potently in the preschool years, they continue to affect the child's emotional development and behavior through the elementary and high-school periods.

One of the two main conclusions of the White House Conference on *The Adolescent in the Family* was that "such externals of home life as economic status or living conditions are not so significant for a child's personality development as are certain parent-child relationships of affection and confidence, the inculcation of regularity in daily health routines, and the illness or nervousness of parents."¹ Healy

¹ White House Conference on Child Health and Protection. *The Adolescent in the Family: A Study of Personality Development in the Home Environment*. New York, D. Appleton-Century Co., 1934.

and Bronner² in their experimental study of delinquents and non-delinquents in the same families found parent-child relationships to be most clearly related to delinquent behavior. The well-adjusted child seems to obtain a normal amount of satisfaction through the parents' approval and acceptance, whereas the delinquent child receives an excess of either solicitude or neglect or is subjected to other unfavorable parental attitudes.

From case studies as well as from books on child psychology and mental hygiene, examples of specific emotional relations in the home which play major roles in a child's adjustment may be obtained. Among those which appear to be especially significant are:

1. The emotional attitudes of father and mother toward a child. Both overprotection and rejection on the part of one or both parents are likely to be detrimental to a child's development.
2. A parent's conscious or unconscious efforts to realize his unfulfilled desires and ambitions in the child. Often these goals set for the child are inappropriate, but the parent feels compelled to have them realized.
3. A parent's failure to accept a child as he is. Sometimes the parent is overambitious for the child; sometimes the parent underestimates the child and lacks confidence in him. In either case the child is not free to be himself and to feel secure in the affections of his parents regardless of what he is able to accomplish or achieve.
4. Conflicts between parents. Whether these are basic conflicts between the father and mother themselves, or disagreements in regard to the child, such an emotional atmosphere in the home is detrimental to the child's personality.
5. Discipline that is inconsistent, causing a child not to know what to expect, or that is too severe. The former frequently leads to anger and temper tantrums; the latter to bitterness as the child grows older.
6. Emotional possessiveness on the part of the parent. In such instances, maladjustment may become crucial at adolescence when boys and girls struggle for independence.
7. Emotional relationships with brothers and sisters. Especially significant is the child's relationship to the younger sibling who, as a new baby, displaces the older child, receiving much of the attention and demonstrations of affection formerly bestowed upon the older one. A "middle" child may feel "neglected," being neither the oldest nor "the baby." The youngest of several children may feel unable to compete with his siblings, all of whom have a "head start" so far as he is concerned.

In recording personal items of this kind, the guidance worker confronts a serious problem. Being highly confidential, information about emotional relations in the home cannot be recorded on cumula-

² Healy, William and Bronner, Augusta F. *New Light on Delinquency and Its Treatment*. New Haven, Conn., Yale University Press, 1936.

tive records that are accessible to all members of the school staff. Being exceedingly complex, this kind of information cannot be written in the small space provided on the usual cumulative record card. At least two alternatives, however, are possible. The confidential information may be kept in a file accessible only to professional guidance workers. Or a note may be made on the cumulative record to the effect that a certain person has additional information. That arrangement permits the person who has the information to use his discretion in giving as much or as little of it as he thinks the person who requested it will use for the good of the individual concerned.

Since factors concerning the home and family are so important in the child's development and since for most children the transition from home to school constitutes a major social and emotional adjustment, to help the child make adjustments necessary as he comes from the more circumscribed area of the home to the larger world of the school, teachers must know something of his family and the kind of life he has been living in his home.

If the home has been able to build sound, wholesome foundations of personality and behavior, the school will welcome parental information and suggestions that may help the teacher to continue this type of development in the child. If the home has failed to accomplish this for the child, the school must strive to compensate as best it can for these lacks. The home which sends to school a child who feels *secure* and *adequate* will want to cooperate with the teacher to help her maintain these bases of personality adjustment in the child. The child who feels *insecure* and *inadequate* may be helped by wise and understanding teachers to develop feelings of security and adequacy at least in relation to his school environment.

Although the school can never be a substitute for the home in meeting these universal needs of childhood, it may in some instances be able to help the family meet these needs more satisfactorily. Close, friendly contacts of home and school early in the child's life are useful in making such help possible.

Early Developmental History

Along with a knowledge of the child's family and home background, the young child's teacher should be familiar with the youngster's developmental history. She should know whether his development has been "normal" or whether it has been unusual in any way. Familiarity with a child's physical history will help a teacher to maintain and protect the youngster's health.

The parent's report of the progress of the child in mental development and in habit training, information regarding the range of the child's previous social experience and his reactions to other children,

and knowledge of a child's play activities, including those with radio and movie programs, will help the teacher to understand the child's reactions and to make the transition from home to school comfortably and easily. The alert parent and the understanding teacher will also want to exchange information regarding the behavior problems which the child presents at home and in school. It is advantageous for parent and teacher to exchange all such information in a friendly conference which may take place routinely shortly after each child enters school.

Growth and Development

It is to the pupil record that the school must turn for evidence of each child's growth and development from year to year.

The "log" book idea used by many teachers in England was introduced in the form of a "Health Book" for each pupil in the Oakland, Calif., schools by Dr. Herbert Stolz, assistant superintendent in charge of individual guidance. Originally called a Health Book because in it were recorded teacher observation of pupils' health needs to be reported to the school nurse or doctor, it broadened into The Individual Guidance Record Book, as teachers added notes on social, emotional, and academic problems.³ Many schools may find it logical and advantageous to begin with a careful health record and gradually enlarge and enrich the record by adding facts regarding the mental, social, emotional, and scholastic growth and development of the child.

To make the measurement of growth as accurate and reliable as possible, the records should include as much objective data as possible; much of such data will be in the form of tests of various kinds. Since objective tests are not available for many aspects of physical, mental, social, and emotional development in which we are interested, subjective evidence will also have to be included in records. Teachers' judgments, children's own judgments, and self-inventories, anecdotal and descriptive records, questionnaires, and ratings of various kinds will augment test records as evidence of yearly increments of growth and development.

Behavior descriptions and anecdotal records forming an accumulated record of direct observation of behavior over a period of time constitute another somewhat recent development found in many school records. "The anecdotal record is a specialized form of incidental observation. It is a description of the child's conduct and personality in terms of frequent brief, concrete observations of the

³ Abbott, Robert B. An Individual "Log" for Each Pupil, in *Guidance in the Elementary School*. Tenth Yearbook of the California Elementary School Principals Association, Vol. 10, May 1938.

pupil made and recorded by the teacher."⁴ As a method, it is applicable at all age levels, from nursery school through college. An anecdotal record contains descriptions of actual behavior taking place in situations noted by the teacher; in this regard it may be contrasted with rating scales which provide records only of the summary interpretation, usually made at stated intervals, of the behavior observed.⁵ The nature and use of anecdotal records, including limitations and cautions to be considered in their preparation, the advantages and values to be derived from their use, and their feasibility as a technique in the public school have been discussed in various publications.^{6 7 8}

The school (and parents ultimately, in most instances) must be interested in each child's growth and development in terms of three relationships: (a) In relation to his own capacity and previous growth; (b) in relation to the school group of which he is a member; (c) in relation to children in general, in his own age group. The first is the one which progressive-minded educators stress, and it is, on the whole, the most important. What we strive for is that every child work at the level of his *own best capacity* and that he constantly *grow and develop*.

The child's "own best capacity" does not refer only to his "I. Q." Each child has well-rounded, varied potentialities in his make-up. He has physical, mental, social, and emotional capacities, all awaiting opportunity for growth and development. If in these varied aspects of development, the child shows progress in relation to his own earlier levels of performance; if he appears to be performing at the highest level of which he is capable for the time being, his growth and development may be regarded as satisfactory. The child who is accomplishing this is a successful child, whether or not he achieves as much as other children of his age or members of his group.

As Kate Wofford⁹ has pointed out, the comparison of the child *with himself* is considered more important for child growth than his comparison *with others*. "In modern education evaluation is fair because growth in children is measured (a) from a point of view of previous maturation and (b) as a point of departure toward the highest possible future achievement of the individual."

⁴ Strang, Ruth. *Counseling Technics in College and Secondary School*. New York, Harper and Brothers, 1937.

⁵ Tyler, Ralph W. *Techniques for Evaluating Behavior*. Educational Research Bulletin, XIII, Jan. 17, 1934.

⁶ Traxler, Arthur E. *The Nature and Use of Anecdotal Records*. Educational Records Supplementary Bulletin D. New York, Educational Records Bureau, January 1939.

⁷ Jarvie, Lawrence L., and Ellingson, Mark. *A Handbook on the Anecdotal Behavior Journal*. Chicago, University of Chicago Press, 1940.

⁸ McCormick, C. F. *The Anecdotal Record in the Appraisal of Personality*. School and Society, 53: 126-27, Jan. 25, 1941.

⁹ Wofford, Kate V. *Modern Education in the Rural School*. New York, The Macmillan Company, 1938.

The child is, however, a member of a group, and we cannot completely ignore the relationship of his achievement to that of other members of the group. If, when working at his top capacity, a youngster lags conspicuously behind his fellows in the amount of his accomplishment, he may, despite our best efforts to avoid it, develop feelings of inadequacy and inferiority which seriously interfere with his happiness and adjustments. Or—vice versa—a pupil's achievement may so conspicuously surpass that of his group that he becomes smug, or bored and lacking in incentives to put forth his best efforts.

The third relationship is important because the child ultimately must adjust to a larger world than that of his school situation. His later achievement will be evaluated in terms of the accomplishments of his fellows in general. In some instances it is especially important that this be borne in mind. For example, consider a child with the generally low-average scholastic aptitude of the sort reflected by an I. Q. of 90 in performance on an intelligence test. In a favored community where the *average* I. Q. of pupils is 110, this child with an I. Q. of 90 is at a distinct disadvantage and may actually seem to be mentally dull. But when compared to children in general, that child has average intelligence. Viewing this question from the reverse angle, one sees that such a child with 90 I. Q. may appear to be intellectually quite superior if he lives in an area in which the population tends to a mental level below the average. In a neighborhood in which the residents have had meager educational, economic, and intellectual opportunities, a boy or girl with just average mental ability may be outstanding in accomplishments. To let such a pupil gain an exaggerated notion of his abilities may mean disappointment and perhaps serious maladjustment when he gets into high school or out into the world of business and industry, if he finds that in that larger sphere he cannot fulfill what were unwarranted expectations.

FUNCTIONS OF THE CUMULATIVE RECORD AT THE ELEMENTARY LEVEL

The modern school tries to plan its curriculum in terms of the needs, interests, and abilities of children. One of the most challenging problems for every teacher is how to adjust instruction to the wide range found in the needs and abilities in any class of children. After a description of a quite typical sixth-grade class, Walter W. Cook,¹⁰ in a monograph on "Grouping and Promotion," raises the question of how does a teacher proceed to meet the needs of each of the 34

¹⁰ Cook, Walter W. *Grouping and Promotion in the Elementary Schools*. Number 2 of the Series on Individualization of Instruction. Minneapolis, University of Minnesota Press, 1941.

individuals in that class. He describes the daily program through which she strives to meet their needs, and then states—

We have seen how Miss Mathews' knowledge of the intellectual and personal characteristics of each pupil enabled her to adapt instructional materials and procedures to their needs. This was made possible only because the administrative and supervisory policies of the school provided adequate test records and reports and made available the necessary materials for a flexible school program.

It is obvious that the individual characteristics and differences of children must be ascertained and recorded before they can be made to serve as a basis upon which meaningful and purposeful learning experiences for pupils may be planned. Records are essential to a constantly evolving curriculum. *Individual differences* in the needs, interests, and abilities of pupils, as revealed through participation in the school program, should be recorded. Such differences indicate the nature and amount of guidance needed by individual pupils at various stages of their development.

Discovery of Gifted Pupils, Slow-Learning Pupils, and Children With Special Abilities and Disabilities

Education has particular responsibilities to children who deviate from their fellows physically, mentally, and emotionally, and who therefore cannot be expected to adjust to the learning situations of their groups unless some special provisions are made for them. The existence and the needs of these exceptional children are best revealed through individual cumulative records. Whether the child be one with superior intellectual ability, or a slow-learning child, or an individual with other types of special abilities or disabilities, no other school device is so likely to indicate the needs, potentialities, and progress of the exceptional child.

The use of records in locating the "slow learner" will serve as an illustration of how records are essential to discovery of the exceptional child whose special needs the school must try to meet. Featherstone¹¹ summarizes the methods which may be used in locating the slow-learning pupils:

1. Examining the age-grade-progress record of the school and locating those pupils who are overage by more than a year.
2. Examining the past school achievement record of all such pupils for consistently mediocre attainments.
3. Administering two group intelligence tests or alternative forms of one test to all pupils if possible, but at least to all those listed as a result of 1 and 2 above.

¹¹ Featherstone, W. B. *Teaching the Slow Learner*. New York, Bureau of Publications, Teachers College, Columbia University, 1941.

4. Giving individual tests to all pupils if possible, but at least to those for whom the facts elicited by means of the procedures outlined above appear inconsistent or inconclusive.

All these procedures should be carried out with an attitude of mind which assumes that no pupil is natively a slow learner until all other causes of functional slowness, such as ill health, poor eyes or ears, unwholesome home or environmental conditions, or meager experiences have been examined and, if possible, corrected.

Obviously, no such procedure to locate the genuinely slow-learning child can be carried through without careful, individual, cumulative records, which include not only school history and achievement, but intelligence test data, health data, facts about home background and experiences, and all other possible factors conducive to functional slowness.

Only a school with records which constantly reveal the special abilities and disabilities of pupils can hope to meet their special needs. Whether the needs of the child of superior ability be met by acceleration, by enrichment through special classes, or by enrichment of his individual program through adjustments of regular classroom facilities, the indications of his needs and the effectiveness with which they are being met can be made evident—over a period of time—only by the adequacy of the records which describe his own reactions, growth, and progress.

Discovery of Personality and Behavior Difficulties and Their Underlying Causes

For the child with special social and emotional needs, anecdotal records, reporting significant behavior incidents and indicating the extent of his progress in adjusting to situations which challenge him, become a major source of guidance in teacher's efforts to meet such individual needs. This keen, directed observation of children which record-keeping stimulates, makes teachers increasingly sensitive to children's needs and difficulties. It is a well-known fact that many of the most serious personality problems of children may pass almost unnoticed in a classroom because the symptoms of the child's problems are not in the form of behavior disturbing to the teacher or the other pupils. Only through careful records kept for every child are such difficulties revealed. Continuous recording of shy, withdrawn, day-dreaming behavior builds evidence of personality trends which should be studied and treated, and which without records might never get attention.

Most school maladjustments result from a constellation or group of causes. Many of the items in cumulative records throw light upon such factors and frequently furnish clues for the discovery of underlying causes. The most effective methods for modifying undesirable

personality and behavior trends and for eliminating school failures of various kinds are those in which the causes of the difficulties are eliminated.

Records not only help to reveal causes, but also promote an understanding of the child so that the teacher may be able to help the child work out his own maladjustments and conflicts. To help the child become able to help himself is the essence of mental hygiene. In some schools pupils participate in keeping their own school records and in preparing the report of progress which goes home to their parents. The values of such pupil participation are pointed out in another chapter of this publication. There are dangers, too, in such a procedure. Unless wisely handled, some children may become discouraged or resentful over records which fall short of their hopes or expectations. But with wise teacher guidance, the child can be helped, through judicious use of his own records, to gain insight into his own problems and to develop understanding of how to work for their solution.

Cooperation With Parents

It has already been stated that understanding and cooperation between the home and the school are regarded as essential in education today. Parent conferences with schools are urged by practically all good schools. Constructive conferences are possible when the school gathers essential data for records and when the school personnel discusses with parents what the school has recorded about the child. A school which has careful records will be much more ready for constructive parent conferences than the school in which such cumulative data are not available. The use of records with parents is discussed in some detail in another section of this bulletin.

Determination as to Promotion, Nonpromotion, or Acceleration

Nowhere is the strong position of the school possessing individual cumulative records more evident than in questions of the grade placement of pupils. Only such records can furnish an adequate basis for deciding whether a child should advance with his group or have some exceptional grade placement. Problems of promotion, nonpromotion, and acceleration constitute an area fraught with difficulties for almost all schools. Decisions regarding each child's school placement should be made in the light of the child's whole history and all the concrete facts which seem relevant to the questions involved. For this a cumulative record is essential. The principal objective of any school placement is the best adjustment possible for the child. When parents are made aware of the child's whole school history and the consideration being given to the child's own welfare, they are likely to be cooperative

in whatever placement the school recommends as a constructive plan for the child. Records are invaluable in helping parents to get a sound perspective on the total picture.

A Basis for Confidential Reports to Outside Specialists or Clinics

Schools frequently seek the help of outside specialists or clinics in trying to solve the baffling problems sometimes encountered in pupils. A child with a serious personality or behavior difficulty may be referred to a private psychiatrist or to a child-guidance clinic for examination and perhaps for treatment. A youngster with unusual reading difficulties may be referred to a specialist or a clinic dealing with special reading cases. Pediatricians may be consulted about undernourishment, possible glandular disorders, or other problems primarily physical. School records constitute valuable and helpful material on which to base confidential reports in cases of such referrals to outside sources of help.

Reports for Other Schools

Much will be gained for children and for schools when all schools have individual cumulative records and when all schools send essential record data to any new school to which a pupil transfers. Whether a child moves on to another elementary school or passes on to a high school, much time can be saved and many mistakes avoided in adjusting him in the new situation if the new school has some understanding of the new pupil and his history when he enters.

Constant Evaluation and Modification of the School Program

Every school's program should be constantly evaluated for its effectiveness in achieving its educational objectives for *all* of its pupils. Is the curriculum what it should be? Are the pupils achieving the objectives set up by the curriculum? If not, why not? Are the instructional procedures adapted to the learning abilities, needs, and interests of the children? What extracurriculum activities are the children having? Are they satisfactory or should they be modified? Careful records for all children are essential if answers to such questions are to be found.

CHAPTER IV

Use of Cumulative Records in High School

By PHILIP A. BOYER

OVERVIEW OF THE SIGNIFICANCE OF THE CUMULATIVE RECORD AT THE HIGH-SCHOOL LEVEL

TO CONSERVE the criterion of effectiveness in the cumulative record, every entry must be chosen with careful regard for its possible relationship to the total ongoing picture of the developing youth. The cumulative record form is but a tool for summarizing significant items of a case history in order to point up the direction and rate of development of the student's traits. It is not enough to know from an individual record that the pupil has certain health qualities, vocational interests, and potentialities in intelligence. The record must indicate the pupil's advances toward maturity, the problems he has met and solved as he has worked toward his goals; the use he has made of his abilities in overcoming difficulties; the experiences which have been satisfying and those which have been annoying.

If pupils are to be treated as individuals, the cumulative record of progress of each pupil must make possible the discovery of the individual in such areas as reflective thinking, sustained intellectual and æsthetic interests, control over problems of practical living. At any given time the record provides both a cross-section picture and a long-range view of pupil development. The completely adequate record thus tends to eliminate or at least to minimize the danger of adult domination. In place of adult "influence" it establishes a sound basis for cooperative planning in which the individual pupil makes as large a contribution as does the teacher or guidance counselor.

The cumulative record should reflect the objectives of the school. If it does not do this, it will have no relation to the educational program and will not be a chart of the progress of the individual's development. In fact, the mere recording of any trait is a measure of the relative importance given to that trait by the school. This idea of importance is bound to be imparted to the pupil. These are the things pupils talk about among themselves and at home. Thus, if a

cumulative record consists almost entirely of teachers' marks in subjects, the teachers' marks in subjects will loom large as objectives in the minds of the pupils. On the other hand, if the cumulative record emphasizes changes in character traits, developing attitudes, widening ranges of interest, and growth in skills, these will assume the importance they deserve and they will serve as major guides to pupil growth. In life, what you are speaks louder than what you say; in school, what you record looms larger than what the teacher *says* is important. Thus the nature of the cumulative record in a real sense, determines the basic objectives of the school.

SIGNIFICANCE OF VARIOUS ITEMS OF THE CUMULATIVE RECORD

Marks and Achievement Test Scores

The scholastic records are probably used more than other parts of the cumulative record. Galbraith¹ reports from a survey of the use of records in Plainfield, N. J., High School that during a period of 2 months all records were consulted at least once, with an average of 52 records consulted for each person making use of the records. Among those persons using the records were office workers, parents, counselors, and 45 percent of the faculty members. These faculty members made 68 percent of the total number of references. Among the items on the records most frequently consulted by teachers were information regarding objective tests, teacher marks, and scholastic aptitude. Achievement, if accurately recorded, is the most important element in the cumulative records for various guidance purposes. Achievement records are used extensively in the guidance of students both as to courses they might reasonably be expected to succeed in and as to occupations they might follow.

Records of Personality and Character Traits

Another experiment conducted in the same high school in Plainfield by Jones and Galbraith² explored the contribution of the anecdotal record in supplementing the cumulative record studied above. The experiment covered a period of 10 weeks in which two-thirds of the teachers contributed nearly 700 anecdotes on 21 percent of the student body of 1,873 pupils. The results of this experiment indicate that data within the anecdote may be abstracted for inclusion in the cumulative

¹ Galbraith, A. How Extensively are Cumulative Records Used by School Faculty? Guidance in Public Secondary Schools. Educational Records Bulletin No. 28. New York, Educational Records Bureau, October 1939. p. 79-85.

² Jones, Galen and Galbraith, Adria. An Experiment With Anecdotal Records. Guidance in Public Secondary Schools. Educational Records Bulletin No. 28. New York, Educational Records Bureau, October 1939, p. 189-202.

record and that this extended form of personality data promises greater usefulness than that recorded in a scale of marks or scores. McCormick's³ study of the Anecdotal Record in the Appraisal of Personality describes the use of an adaptation of Progressive Education Association's behavior descriptions with the conclusion that "teachers have been quick to see the value of this type of report," though recognizing difficulties particularly in selecting significant anecdotes for so-called neutral or average pupils. This experience is supported by that of a group of teachers in the Tilden Junior High School in Philadelphia in which personality and character are appraised through the aid both of a scaled schedule and of an independent behavior journal.

Teachers are coming to see more clearly the essential concept that real education involves the whole integrated personality of the individual. They are no longer satisfied with a cross-section, snapshot view of an individual at a given time or in a given situation. The evaluation of a pupil's behavior must tap all aspects of his physical, mental, moral, aesthetic, and emotional growth. Evaluation must be simultaneous in all these areas if it is to be fully significant. It must be based on recognition of the intimate interrelation of growth in these respective areas as well as on study of the stages of growth through which the pupil has passed to reach his present level of development. In order to provide anything approaching such a substantial basis for the evaluation of pupil behavior the cumulative record should carry continuing entries of pupil development in all significant aspects from physical growth to emotional security.

Important progress in the direction of thoroughgoing understanding of the personality and character qualities of pupils has been made in the school systems that have collaborated with the Commission on Teacher Education of the American Council on Education. Concentrated study of a relatively few pupils develops intimacy and fullness of understanding and produces facility in the objective recording of items likely to be significant in understanding the individual pupil drives and environmental presses. Recognition of the relation of these drives and presses to the personality and character qualities of the pupils studied makes for effective guidance of these pupils. It also develops techniques of observation that promote sympathetic understanding of the problems of adjustment progressively being faced by all pupils.

Health Information

In the high school it is peculiarly appropriate that each pupil be encouraged to assume responsibility for maintaining the best possible

³ McCormick, C. F. The Anecdotal Record in the Appraisal of Personality. *School and Society*, 53: 126-27, Jan. 25, 1941.

health for himself. Cumulative records will, of course, contain periodic entries concerning physical growth and development, immunizations, incidence of serious illness, and remediable defects and their correction. It is important also that there be continuing record of strength, endurance, and body control with data as to recreational skills such as swimming, individual or dual sports, team games, and rhythmic. Such areas as these, together with leisure-time activities and social attitudes and interests, offer excellent opportunity for pupil participation in the maintenance of the record. It is important that the cumulative record be viewed by the pupil and by the teacher as a cooperative enterprise. The value of the record is thus materially enhanced. It becomes a stimulus to further growth toward the attainment of clearly outlined objectives. Teacher marks in academic subject achievement have assumed disproportionate emphasis because for a long time they were the major items of concern in the record. A cumulative health record will do much to clarify health, grace, and bodily vigor as major objectives of the school. So also the broadening of the record to include social and emotional growth will elevate these aspects to deserved levels of importance in the integrated personality. Strength, endurance, and bodily control are wartime imperatives and prime essentials in peace. In promoting pupil progress toward attaining these goals the cumulative, continuing record will perform an essential service in the advance toward a high level of community and individual health.

TYPES OF PROCEDURE IN THE USE OF CUMULATIVE RECORDS IN GUIDANCE

The Interview

The key to effective guidance frequently lies in the success of the interview. With complete and readily interpreted records studied prior to the interview, the counselor is spared the necessity of asking numerous questions, and the interview can be directed to diagnosis and counseling rather than to inquisition. It should be remembered that information collected during an interview occasioned by some crisis in the pupil's life may not be as trustworthy as information collected normally in the matter-of-fact operation of the school. For this reason the interviewer finds it necessary to depend rather heavily upon records as they are, complete or incomplete.

It is during the interview that the counselor and the counselee should reach their highest degree of cooperation. The possibilities of cooperation are enhanced if the pupil has some knowledge of the record and if the counselor approaches the interview with a background of essential information collected in dependable form and

not based entirely upon more or less insecure memory of previous contacts. The important value of the interview as a therapeutic device to relieve the pupil of tensions can be assured only if the counselor has the full confidence of the pupil. The complete cumulative record gives assurance of rapport.

Career planning on the basis of information contained in the cumulative record involves an interpretation of the aptitudes and interests of the individual into terms of happiness and success in a chosen field of life activity. The complex decisions involved in this process require all the information that counselor and counselee together can develop concerning the traits of the individual and the demands and rewards of the career.

Following a review of the types and merits of individual items useful in analyzing a pupil's characteristic traits, Ruch and Segel make this observation:

The unique value of an individual inventory kept as a cumulative record lies in two facts. One is that the record of any trait of an individual over a period of years is more significant than the record of that trait taken at any one point. The other is the fact that estimates on many different traits afford a much more accurate picture of the person's educational and vocational possibilities than the estimate of a single trait.⁴

Cooperative Effort of Counselors and Pupils in Appraising the Information in the Cumulative Record

One of the most commonly accepted objectives of guidance is to make self-guidance increasingly possible. The counselor's task is to encourage the boys and girls to acquire a thorough understanding of their needs, aptitudes, and abilities. It is important for the counselor to realize that the specialist in knowledge about any pupil is the pupil himself. The pupil and his parents probably know more about the individual than does any teacher or counselor, even with the aid of the cumulative summary of the knowledge of all the teachers and counselors as represented in the ordinary cumulative record. It should be noted here that while the counselor may be in possession of specialized techniques, it is inevitable that the teacher will exercise the function of guidance in her daily contacts with pupils. The teacher-counselor's part is to be an expert in understanding the significance of an individual pupil's behavior. The teacher-counselor must retain a due sense of proportion regarding the significance of his generalized knowledge, as compared with the uniqueness of the interpretation of these laws in the individual's actions. The wise teacher-counselor, therefore, approaches with humility and friendliness those instances in which

⁴ Ruch, Giles M., and Segel, David. Minimum Essentials of the Individual Inventory in Guidance. U. S. Office of Education, Vocational Division Bulletin No. 202.

his opinion is flaunted. He knows full well that exception is a general rule of human behavior and that guidance is distinctly a cooperative process in which, in the last analysis, the pupil guided makes his own decisions.

That the limitations in counseling are not fully accepted by teacher-counselors and that there is need for much improvement in both the friendliness and the expertness of contacts with counselees is the evidence submitted by Spaulding.⁵ The pupils in his investigation stated bluntly that they did not have very much respect for the opinions of teachers on personal matters or matters far removed from their cloistered academic specialties. Here is a challenge not only for teachers to be persons, but also for both teachers and pupils to see the advantages of full cooperation in the construction and interpretation of cumulative records.

Pupil Self-Appraisal

An important part of the service of an adequate system of cumulative records is to bring pupils to a rational appraisal of their own interests and capacities. Self-measurement projects have been developed in Providence, R. I.,⁶ New Trier, Ill.,⁷ and Philadelphia, Pa.⁸ The purpose of these projects is to inform pupils about their special aptitudes and interests with a degree of accuracy approaching that for other information they have about themselves—their height, weight, physical disabilities, and special abilities. In guiding pupils to gather and analyze accurate knowledge about their own characteristic traits, the school serves one of its most important guidance functions.

With an adequate understanding that the purpose of keeping records is to enable the pupil better to understand himself, pupil cooperation is assured and a new confidence characterizes the relations of pupils and counselor. Pupils will take tests, answer questionnaires, provide autobiographies and similar materials with great interest if they realize that the program is designed to help them understand themselves rather than to afford the threatening gesture of a cold revealing record that may haunt them at a later day. Good

⁵ Spaulding, Francis T. *High School and Life. The Regent's Inquiry into the Character and Cost of Public Education in the State of New York.* New York, McGraw-Hill Company, 1938. p. 31.

⁶ Allen, Richard D. *The Use of Tests as Instructional Materials.* *Understanding the Child*, 9: 3-6, January 1941.

⁷ Nelson, M. P. *Appraising Vocational Aptitudes.* *Nation's Schools*, 26: 25-26, August 1940.

⁸ School District of Philadelphia, Division of Educational Research. *The Self-Appraisal Program of Guidance in the Junior High Schools of Philadelphia, Handbook for Teachers*, 1944.

cumulative records are cooperatively devised and thoroughly understood by both teacher-counselor and pupil concerned.

Pupil cooperation in the construction of cumulative records should be restricted to the cooperation of an individual pupil with the teacher-counselor in the construction of his own record. Only as the pupil has full confidence that his defects and peculiarities will not be exposed to general view is he likely to be fully cooperative in introducing many items into the record. Consequently, it is unwise to use pupil assistance in the construction of the records of others. Only the teacher-counselor and responsible adult secretarial help should have access to the cumulative record that is designed to help the pupil to understand himself. The use of student aides in keeping records for anyone but themselves is a highly questionable procedure.

The Cumulative Record and the Integration of Pupil Growth

The chief determiner of the effectiveness of use of cumulative records is the basic significance of the content of the records themselves. This significance in turn is determined largely by the activating philosophy of the school system maintaining the record and the functioning techniques of the teacher-counselor both in making and in using the record. In many high schools, records emphasize academic achievement so strongly as to minimize attention to other aspects of growth. The traditional lack of thorough-going longitudinal record upon which to base study of all the broad phases of individual pupil development will be corrected as educational practice approaches realization of its presently evolving theory. The vocational and the personal-social adjustment of pupils requires synthesis and integration of all the information about the individual. As integration really attains status as a matter of paramount importance in education, cumulative long-term records will be recognized as essential. They will contain significant data showing stages of individual progress in attaining goals. They will be consulted frequently by teachers cognizant of the basic needs of pupils and skilled in promoting optimum growth and adjustment—physical, intellectual, social, and emotional.

IN-SERVICE TEACHER EDUCATION IN THE USE OF THE RECORD

There is general unanimity of opinion in educational literature concerning the significance of the cumulative record as a necessary background for sound teaching and guidance. Billett⁹ lays special emphasis on the "indispensable role of standardized test scores in the

⁹ Billett, Roy O. *Fundamentals of Secondary School Teaching*. Cambridge, Mass., Houghton Mifflin Co., 1940. 657 p.

cumulative record." Fisher¹⁰ appraising the comprehensive nature of a complete record indicates that "an effective guidance record system swings the whole school staff into line as active contributors in the task of assembling information about the 'whole' child, and in the task of using that information constructively to help each child make the most of himself." Traxler¹¹ stresses the importance of experienced and understanding use of records and suggests in-service teacher education that will promote:

(1) An interest on the part of the teacher in every pupil as an individual, (2) as great simplicity as is feasible in the form of the cumulative record, (3) easy access to the cumulative records, (4) such familiarity with every portion of the record card (including the graphic record of the results) that the essential facts may be read in a very brief time, (5) skill in synthesizing the detailed data on the record in order to get a unified picture of the pupil, (6) ability to discover need for training in basic skills and to apply remedial treatment in those areas that belong to the teacher's special field, (7) ability to recognize in the records indications of special problems of adjustment that call for the attention of a psychologist or psychiatrist, and (8) reasonable freedom in adjusting class programs to the needs of individual pupils, even though such adjustment means departure from generally prescribed courses of study.

¹⁰ Fisher, Mildred. The Cumulative Record as a Factor in Guidance. *Journal of Educational Sociology*, 5: 344-58, February 1932.

¹¹ Traxler, Arthur E., ed. Guidance in Public Secondary Schools. Educational Records Bulletin No. 28. New York, Educational Records Bureau, 1939.

CHAPTER V

Educational and Psychological Tests in Relation to Cumulative Records

By SAUL B. SELLS

IN A SCHOOL SYSTEM which is using or installing a cumulative record system the planning of the testing program is of especial importance because of the interrelation of the use of test scores and the cumulative record. The record-keeping plan should be devised with sufficient flexibility to permit the use of many different tests and with relation to the complete range of testing needs of the staff and the student body.

Long-range planning is essential. The testing program and the cumulative test record should be considered in relation to the educational objectives of the school. When individual growth is a matter of concern, in academic work and in guidance, periodic tests of intellect, scholastic attainment, personality development, and special aptitudes may furnish an objective record of individual progress.

In order that teachers and administrators inexperienced in testing may select tests wisely and record test scores intelligently on the cumulative record a brief discussion is included here of basic considerations in testing.

BASIC CONSIDERATIONS IN TESTING

Tests are instruments of measurement. A primary feature of every test is that it can be applied to express some characteristic of behavior on a quantitative scale. These characteristics may be abilities, skills, attitudes, or information. The worth of a test may be evaluated by the degree to which it measures the particular characteristic that it claims to measure; by the degree to which the scale on which its results are expressed is meaningful, accurate, and sensitive; and also by the degree that its use is unrestricted by cost in time and money, by requirements of special training for administration, scoring, and interpretation, or by special equipment or facilities.

Types of Tests

Tests may be classified by types in terms of the characteristics they measure, as follows:

Intelligence tests measure development in intellectual functions such as judgment, reasoning, and imagination, and in academic skills involving them, such as reading, arithmetic processes, verbal tasks, and spatial judgments. Most intelligence tests have been developed with growth in ability to perform successfully in school as a basic criterion. Such tests may therefore be regarded as measures of scholastic aptitude. Their use usually assumes some special cultural background. Performance tests of intelligence, which are necessary for examining persons with sensory, physical, or language handicaps, are usually based largely on manipulative skills and on spatial judgments. Such tests are less closely related to academic performance. The intercorrelations between most paper-and-pencil intelligence tests vary from about .70 to .80, while correlations between these and general mental performance tests seldom exceed .40.

Achievement tests are basically instruments for the appraisal of outcomes of education. Changes in individual pupils following a given course of instruction, such as the acquisition of new information, skills, attitudes, understandings, appreciations, are measured by achievement tests. Such instruments are fundamental to any progressive school endeavor, for they furnish an accurate and objective means of appraising accomplishment. As educational methods and content progress and change, it is necessary for achievement tests to change accordingly. The old type of recall-of-specific-information achievement test is thus fast becoming obsolete. The requirements of the new education have flung a challenge to the test makers to devise new-type tests to capture the more-difficult-to-measure outcomes of newer practices.

Personality and character tests include (1) adjustment inventories and questionnaires dealing with broad aspects of the personality, such as traits descriptive of generalized patterns of behavior or general adjustment to various types of situations; (2) check lists and rating scales of similar scope and purpose; (3) performance tests of expressive movements or behavior, such as Downey's tests of "will-temperament," based on expression through handwriting; (4) situation tests of character traits, such as May and Hartshorne's honesty tests, involving the display of honesty in specific situations; (5) projective tests which seek to disclose the meanings and feelings concealed within the individual by requiring him to organize a new field, to interpret material, or to react effectively to it. Rorschach's Ink Blot test is a good example of projective technic.

Interest and attitude tests are very similar in form, construction, validation, and interpretation. They consist of inventories, questionnaires, check-lists, and rating scales. *Interest tests* deal largely with academic and vocational interests, although some have dealt with leisure-time interests. High correlations have been obtained by several investigators between information-achievement tests and academic interest tests. *Attitude tests* deal with abstract issues of a political and social nature and with opinions related to specific current events, personalities, and issues. These tests have been restricted largely to research investigations, although they are beginning to be accepted as part of batteries of personnel and achievement tests.

Aptitude tests are sometimes called prognosis tests. They include two types of tests. The *first* is a wide variety of instruments dealing with specific sensory or sensory-motor functions, such as visual acuity, color vision, finger dexterity, or eye-hand coordination. Such tests measure specific abilities which are deemed essential to the development of special skills. For example, the Seashore Musical Talent Test measures six sensory functions which are necessary to the development of musical virtuosity. Without an adequate sense of time, pitch, or loudness discrimination, for example, one would have difficulty in mastering an instrument. The *second* type of aptitude test includes a wide range of tests of special skills or abilities. Such tests are used for predicting successful development of those skills or abilities. Intelligence tests used to predict academic aptitude are in this sense prognosis tests. Growing recognition of the fact that a multitude of factors of personality adjustment, socio-economic status, instruction, physical status, as well as ability are essential to accurate prediction, is leading to the development of test batteries rather than single tests for prognostic work. By this definition of "aptitude" tests it is not meant that these are the only tests that can be used to predict achievement since any test result as well as school marks and other items of the cumulative record are all predictive—otherwise their presence in the cumulative record would not be tolerated.

Diagnostic tests are generally highly detailed individual interviews or paper-and-pencil tests directed toward the analysis of individual performance in a restricted area. All tests are diagnostic to the degree that they explain individual behavior. However, diagnostic tests are designed systematically to detect difficulties. For example, when a pupil fails in reading, but has normal intelligence and no obvious speech difficulty or sensory defect, it is necessary to observe his reading of many specific types of material systematically in searching for the source of error. Oftentimes the cause of failure lies not in the material, but in related conditions at home, in school, or in the social-play situation. Diagnostic tests of school-centered skills have been published. Many require specialized clinical training, while others

can be used with reasonable results by the classroom teacher after a few hours of instruction.

Selection of Tests

It is the practice of most large school systems to make available to teachers, guidance workers, and other staff members a list of approved tests which may be requisitioned for various purposes. Where a testing program is interrelated with a cumulative record program it may be necessary to frame this list so as to prescribe tests more rigidly. The tests must be chosen with respect to the specific objectives of the programs.

In addition to this major consideration it is necessary to consider a number of technical factors, most of which can be appraised by a careful reading of the publisher's test catalog or supplemented by the examiner's manual issued with individual tests. Test publishers have a responsibility to include in their catalogs adequate data to assist test users in selecting tests critically. A test catalog should always provide an adequate discussion of the following factors for each test: (a) A statement of the purpose of the test—what it measures and persons for whom it is appropriate; (b) norms; (c) method of standardization; (d) validity; (e) reliability; (f) scope or coverage of test items; (g) specific outcomes or functions measured; (h) number of alternate forms; (i) type of score obtained; (j) any special problems in administration, scoring, and interpretation; (k) cost per unit; (l) estimates of testing time and scoring time per unit.

Discussion of these factors in the catalog should be presented in greater detail in each test manual. On the basis of preliminary screening of the catalog, specimen sets of tests and accompanying manuals representing a preliminary selection should be obtained for further detailed examination. The description of the published norms should assist in determining whether and how the test norms are related to the group to be tested. For example, a test which provides norms in terms of the general adult population cannot be readily interpreted in a school situation; its use for school purposes should be made with caution.

WHO USES TEST SCORES IN THE SCHOOLS AND WHY?

Tests may be valuable instruments to the teacher, the supervisor, the school superintendent, the guidance worker, the psychologist, and psychiatrist in child-guidance clinics, the curriculum specialist, and the research worker.

The teacher can use test scores to appraise quickly the intellectual development, academic achievement, interests, strengths, and weaknesses of a whole class in planning a program of individualized in-

struction. Without special clinical training, the classroom teacher can use aptitude tests and diagnostic instruments as basis for remedial instruction in reading, arithmetic, and other skills. Pupils who deviate extremely from their group averages can be detected with accuracy and with efficiency through the classifying ability of group tests. In the absence of standardized tests this important function might often require weeks even for a highly capable teacher. To the extent that every teacher participates in the individual guidance of every pupil, the teacher can utilize test findings to obtain a better understanding of the pupil and to check impressions and first-hand observations with the objective data.

The supervisor can effect sound pupil personnel classification with the aid of tests. Homogeneous grouping, where intellect and achievement are criteria, may be facilitated with quantitative scores. In the placement of new pupils, in the examination of problem cases, or in any analysis of individual pupils, the objective data of standardized tests are valuable. In the supervision of instruction and of guidance, test results may assist the supervisor to discover problems and to plan for their solution.

The school superintendent, through broad testing programs, may obtain significant data for planning and for the evaluation of instructional programs. The number of pupils with I. Q.'s below 70 or the incidence rate of visual or auditory disability, for example, may be obtained readily through all-pupil city-wide or sample surveys. The superintendent can use such statistics to estimate the number of special classes and teachers of each type required. Test results also furnish important data for evaluating the outcomes of specific curricula, methods, groupings, or other programs. Finally, for purposes of comparison of current pupil population with those of other years or of other school systems, standardized tests are invaluable.

To the guidance worker, tests are primary professional tools. The needs of successful pupil guidance require diverse information describing individual intellectual, academic, physical, and social development. Developmental analyses of individual pupils may be obtained through the use of intelligence, achievement, personality, interest, and attitude, and aptitude tests, repeated at regular intervals. The usefulness of large accumulations of data may be enhanced by the use of cumulative records with appropriate provision for their notation.

The placement officer is a specialized guidance worker. His special objective is to find the right person for the job. In addition to the detailed developmental information available, the placement officer may find it important to consider special aptitude and information tests for the selection of individuals with special qualifications.

The curriculum specialist and the research worker are interested in test results, not so much from the standpoint of individual devel-

opment, as from that of the effect of specific materials, methods, and conditions upon the individual. Tests developed to measure specific skills, understandings, attitudes, appreciations, interests, and information are valuable in appraising outcomes of instruction in regular and experimental situations. Reading and intelligence tests have been used as criteria in efforts to develop objective techniques of measuring the difficulty or "level" of reading and curricular materials.

CUMULATIVE RECORDS AND TEST RESULTS

Interdependence of the Record and the Testing Program

Interdependence of the cumulative test record and the testing program cannot be overemphasized. All important test findings concerning each individual pupil should be recorded properly on his cumulative record. Unrecorded tests may be used for one purpose at one time by one teacher or counselor, but they are not likely to be considered in any other connection or at any other time as part of the complete file of guidance information for that pupil. If the test record should not provide adequate space for any test or type of test, this limitation may actually place an obstacle before the full development of a testing program.

Cumulative test records place restrictions on the manner of recording test results by the space they provide for such notations. These restrictions in turn place limitations on the uses of tests. It is important therefore in planning the record to contemplate fully the uses to be made of it. Since the records are designed primarily for the assistance of teachers and counselors, it is desirable to record test results in the form of grade norms or percentiles; however, if they are to be used also for research purposes, it may be important to record original scores which are more suitable for statistical analysis. Graphic devices, such as the percentile chart developed by the Cooperative Test Service of the American Council on Education, have been found by some to be of value through presenting a visual picture of developmental trends and of the relative standing of the individual on each test. As the record is used in counseling individual pupils and in discussing pupil progress with parents, such graphic devices become of greater importance.

In any case it is essential to insure that adequate spaces are provided for recording of tests which may be of significance for the chief educational purposes for which the record is to be used. Failure to do this may result in repetition of the aggravating experience of schools in which tests were given for which no available space on the cumulative record could be found. In such cases it was not uncommon virtually to discard the results.

What to Record—Kinds of Test Scores

The recording of test results on cumulative records should be given much consideration and careful planning. The notation of a test score, usually designated by a number representing a raw score, a scaled score, a percentile, age, or grade equivalent, or some other statistic is meaningful only in terms of the scale on which it is based. Different kinds of test scores vary widely in usefulness. They may be distinguished on the basis of a number of factors, including their dependence on the number of items in the test, the method of scoring, the population group on which the test is standardized, and the method of scaling.

Raw scores.—The raw test score is the direct test result. If it is computed in terms of number of items right, then the size of score will be related directly to the number of items. Similarly, if it is computed by such devices as number right minus number wrong on number right minus a fraction of number wrong, the score will be closely related to the number of items. Numerically, such scores are also related to the difficulty of items and to time limits, if any, imposed on the test. If items are weighted and a score value attached to each, the total score is a function of the number of items times the scoring weights attached to them. It is undesirable to record raw scores on cumulative records, first because such data are difficult to understand, except by reference to a table of norms for interpretation, and, second, because of lack of comparability either between scores on the same test or between scores on different tests. Such scores may, however, be both necessary and useful for statistical or research purposes. Where such uses are contemplated a separate record is recommended.

Scaled scores.—A number of different kinds of scaled scores have been devised. If all the items in a test were selected to form a continuous series with each one more difficult than the preceding one by a constant increment, we should have a scale. The basic characteristic of all scales is equality of score units throughout the scale. However, while such equality of score units has the advantage of facilitating comparisons, it is desirable to achieve comparability from one test to another. This requires a common scale for all tests. The Cooperative Test Service of the American Council on Education has made significant progress in the establishment of a common scale for the Cooperative Achievement Tests. This scale has a range from 0 to 100 in equal steps. Raw scores on each test are converted directly to scaled scores by a table. This has the advantage of facilitating easy interpretation by representing all tests in the series in terms of a standard scaled 100-item test.

A score on the Cooperative Scale represents the score "which an average child would make at the end of a particular course if he

had attended school and had taken the usual amount of the subject in question." The size of the unit is similar for all tests. This definition of the average 50-point is incomplete without specific information regarding what is considered the "usual amount of the subject" and also the grades in which this usual amount is taken. These were specified by the Cooperative Test Service and it was acknowledged that the comparability of the scores in the scale was limited to those specified conditions.

In effect most elementary and high-school subject batteries have scaled scores for the various subtests. Thereby the results on the various subtests can be compared directly with each other for any one individual and also between individuals. In the case of elementary-school batteries these scaled scores are related directly to age and grade scores.

Percentile scores.—Although scaled scores represent equal increments of learning throughout the scale and are the most accurate way of presenting test scores, another method has been found to have more practical use in some situations. These are percentile scores. A percentile score shows the relative standing of a pupil with respect to a particular group. For example, a pupil in the eighth grade and a pupil in the fifth grade may attain the same score on the same test. In terms of the scale it is possible to compare the achievement of the two pupils directly. However, it is necessary to have norms for fifth grade and norms for eighth grade in order to rank each of these pupils in terms of his standing in his own group. This can be done by computing from representative distributions of scores for each grade percentile norms equivalent to scores.

Also percentile scores have the advantage of comparability since all percentile scales are identical in construction. A percentile score shows the relative position of any individual in a specific population on a percentage basis. For example, a score at the ninetieth percentile for a grade is one which exceeds 90 percent of the scores for that grade and is exceeded by 10 percent of the scores for that grade. A score at the fiftieth percentile falls at the middle of the group. A score at the twentieth percentile is exceeded by 80 percent of the cases. The advantage of comprehensibility of the percentile score may be greatly offset, however, by the variation between population groups on which different tests and consequently different percentile scales have been standardized. For example, if the percentile table for one test is based on a comparatively dull group then the two scales are not equivalent. A low percentile score in the first case could be demonstrated to be superior to a higher percentile in the second case. These difficulties may be overcome by stand-

ardization of all tests on a common scale by the test publisher (as in the case of the Cooperative Test Service) or by the research department of the school system. It is dangerous, however, to use percentile scores uncritically without such standardization.

Age and grade equivalents.—Many standardized test norms are published with age and grade equivalents for raw or scaled scores. Such norms are subject to the same limitation as percentiles in that they depend for comparability upon equivalence of the populations on which they are standardized. It is possible, however, by a simple test to determine the appropriateness of such norms for any school system by comparing the normal age-grade progress charts of that school system with the age and grade equivalents published with the test. For example, if the average age of first-grade pupils in a school system is 6 years 6 months, whereas the age equivalent for that grade in the published test norms is 6-0, then it may be concluded that the published norms require adjustment for use in that school system. The adjustment in the case cited would be either to increase the grade equivalent to correspond with the average age for that grade in that school system or to increase the score equivalent for that grade appropriately. Age or grade scores are not as sensitive to small variations in ability or performance as percentiles or scaled scores, but they have the advantage of representing measures of ability and achievement in relation to well-known landmarks of school progress.

Aptitude test scores.—Many aptitude tests of potential value in guidance work have been published with comparative data only on small specialized populations. Partly because of frequent unavailability of adequate norms, and more particularly for logical reasons, it is suggested that the recording of scores on such tests in score terms may be less profitable than in broad diagnostic or prognostic terms such as low, normal, or superior ability. This practice is common in the medical profession with many clinical tests. Medical records abound in notations opposite specific items of positive or negative, or of minus, normal, or plus, instead of quantitative findings. The significance of such notations, both to the teacher and the guidance worker, is clear. Aptitude tests are seldom given periodically, and trends are not as essential as a complete record of all tests and subtests given. As far as possible every record entry should be meaningful without the necessity of recourse by the teacher, counselor, or other person using the record to manuals, tables, books, or other references to explain the meanings of the entries. Graphic charts showing trends in terms of percentile scores with age or grade equivalents appropriately equated to the school population may be used for intelligence and achievement tests, and for personality tests if they are

given. Broad diagnostic terms, such as low, normal, or superior ability are recommended for recording the results of aptitude tests.

Recommended minimum data regarding test results.—The following data may be regarded as a minimum in recording any test result on a cumulative record:

- (1) Complete name and identification of test, e. g., New Standard Achievement Test, Form A, Intermediate Level;
- (2) Date given, e. g., January 12, 1943;
- (3) By whom given; this may be important in the case of individual tests or to identify tests included in formal testing programs from those given by class teachers;
- (4) The initials of the person recording the score, unless a formal procedure for recording is used;
- (5) Type of score. In all cases where a standardized type of score has not been adopted, abbreviations, such as Petile. (percentile), age gr. (grade), etc., are adequate to identify the type of score.

Even if a graphic record is maintained, space should be provided for the recording of these data as well.

Further Study of Test Interpretation

It is impossible in the short space allotted to measurement to give a complete working outline of the possibilities of using test scores in cumulative records. The reader is referred for further study about the use of tests to the following publications:

- GREENE, EDWARD E. *Measurements of Human Behavior*. New York, Odyssey Press, 1941.
- GREENE, HARRY A., JORGENSEN, ALBERT N., and GERBERICH, J. RAYMOND. *Measurement and Evaluation in the Elementary School*. New York, Longmans, Greene and Co., 1942.
- GREENE, HARRY A., JORGENSEN, ALBERT N., and GERBERICH, J. RAYMOND. *Measurement and Evaluation in the Secondary School*. New York, Longmans, Greene and Co., 1943.
- PATTERSON, DONALD G., SCHNEIDLER, GWENDOLEN G., and WILLIAMSON, EDMUND G. *Student Guidance Techniques*. New York, McGraw-Hill Book Co., 1938.
- RUCH, G. M., and SEGEL, DAVID. *Minimum Essentials of the Individual Inventory in Guidance*. Washington, U. S. Government Printing Office, 1940. (U. S. Office of Education, Vocational Division Bulletin No. 202.)

CHAPTER VI

Records of Reading Ability, Habits, and Interests

By RUTH STRANG

A CONTINUOUS and comprehensive record of a pupil's school achievement over a period of years constitutes a sound basis for his educational guidance. The record should be continuous in order to show the pupil's progress from kindergarten to college, and thus to give both pupil and teacher the sense of continuity of development. The record should be comprehensive in order to conform to approved objectives of education and to represent all important aspects of achievement.

The usual record of a pupil's marks in each subject indicates general scholastic trends, but it does not give enough help in improving his achievement. To be definitely helpful, the record should indicate in what respects his achievement is below expectation and what factors may be responsible for the discrepancy between his achievement and his ability. In other words, the record should have diagnostic value.

The importance of a cumulative record of achievement, highly useful in all subjects, can be illustrated best in the field of reading, for reading ability is basic to school success. Poor reading ability frequently leads to failure in school subjects and failure is a key link in the chain that may lead to dislike of school, truancy, and juvenile delinquency. Moreover, from his reading of newspapers, magazines, and books a pupil gains many ideas which, to some extent, control his behavior. Thus, reading may play a critical role in the individual's total adjustment.

Broadly defined, reading ability is a matter not only of accuracy, adequacy, and rate of comprehension, but also of reading habits and interests. Thus defined, reading items require more space than is usually allocated on cumulative records. Actually, as shown in table III, only 11 percent of the schools included a record of reading in their cumulative records. The highest percentage of these reading records was found in the city secondary schools. A thorough diag-

nosis of reading ability may involve all the items in a comprehensive cumulative record.

Developmental Reading Records

In the cumulative records kept for all pupils, the following items should be included to give an adequate picture of a child's development in reading:

1. Vocabulary knowledge
2. Comprehension of a variety of reading material
3. Rate of comprehension
4. Ability to use material read—
 - (a) To follow directions
 - (b) To judge the truth of ideas gained from reading
 - (c) To draw sound inferences
 - (d) To solve practical problems
 - (e) To stimulate creative thinking
 - (f) To develop appreciations
5. Habits of reading relating to—
 - (a) Time spent in reading
 - (b) Quality of reading
 - (c) Use of the library
6. Reading interests

Some of these items are already included in many cumulative records under teachers' marks and results of standardized tests. The reasons for including information on all of these items will be briefly stated in the following paragraphs. The statements made are supported by research, much of which has been reviewed in published sources.¹

Evidences of the scope and precision of pupils' vocabulary should certainly be included in the cumulative records of all pupils for at least four reasons. First, vocabulary test scores are one of the best measures of general scholastic aptitude; second, vocabulary scores are more closely related to reading comprehension than any other single type of measurement; third, vocabulary knowledge enters as one of the two or three most important common factors into reading ability as a whole; and, fourth, vocabulary is given a good deal of weight in formulas for the estimation of the structural difficulty of reading material. By means of cumulative records the development of the meaning vocabularies of children may be studied. It has been esti-

¹ Gray, William S., *et al.* Reading. Review of Educational Research, 7:493-507, December 1937.

Gray, William S., *ed.*, Reading in General Education. Washington, D. C., American Council on Education, 1940.

Strang, Ruth. Problems in the Improvement of Reading in College and Secondary School (Rev.). Lancaster, Pa., The Science Press Printing Company, 1941.

Traxler, Arthur. Summary and Selected Bibliography of Research Relating to the Diagnosis and Teaching of Reading, October 1938 to September 1939. Educational Records Supplementary Bulletin F. New York, Educational Records Bureau, October 1939.

mated that children entering school have, on the average, a vocabulary of about 2,700 words and that this number should increase to 10,000 and, in some groups, to 25,000 word meanings by the time the pupils leave the ninth grade.

A second item that should surely be included on the cumulative record is reading comprehension. This, of course, is the heart of reading proficiency, for comprehension is basic to interpretation, appreciation, and application. Moreover, measures of reading comprehension are definitely related to school achievement. It has been found, for example, that specific effort to improve reading resulted in an increase in achievement in subjects which involve considerable reading.

A slow rate is probably the aspect of reading most frequently recognized by pupils and teachers as a reading deficiency. And there is no doubt but that rate is one of the major elements in effective reading. Speed and comprehension may run parallel in the case of certain types of easy reading material. This relationship, however, frequently does not exist when the passages are difficult and technical. In fact, good readers are distinguished from poor readers by their adaptability and flexibility in adjusting their rate of reading to the material and to their purpose. It is recommended, therefore, that rate of reading scores have a place in the cumulative record, provided they are interpreted in the light of the specific material and the mind-set of the reader.

As ability to use the material read is the real test of the effective reader, a record should be kept of this functional aspect of reading. Moreover, several researches have shown that the mere ability to reproduce the content does not necessarily insure ability to think straight on the material read. Nor does the comprehension of a reading passage necessarily result in correct application to practical problems. The ability to use or apply material read is one of the most significant that could be recorded for guidance purposes.

For a somewhat different reason habits of reading are important to record. Improvement of reading cannot be expected if other activities crowd out reading. Studies have shown that gifted children spend more time in reading and read a better quality of books and magazines than do average or mentally inferior children. The good readers among 200 adults read more than three times as many magazines and six times as many books as the poorest readers. Their reading was also of a better quality.²

Although reading habits and reading interests often run along the same channel, they sometimes diverge because of environmental

² Buswell, Guy Thomas. *How Adults Read*. Chicago, The University of Chicago, 1937. p. 39-40.

opportunities and pressures. For this reason interests should have a separate place on the cumulative record. Another reason why space should be given to a record of reading interests is that interests are the growing point of improvement in reading; they direct and motivate learning. Frequently a pupil retarded in reading has been stimulated to exert the real effort required in acquiring reading skills by his desire to find out about something in which he is keenly interested. An equally strong reason for giving space on the cumulative record to reading interests is that improvement of reading tastes is one of the major objectives of reading instruction. In discussing reading interests, Gray concluded that—

A knowledge of the reading interests of children is of large importance both in providing appropriate materials for basic instruction in reading and in establishing permanent habits of independent reading.³

These are weighty reasons for recording pupils' reading interests.

It is difficult to estimate the relative importance of the items suggested for inclusion on the developmental reading records. Vocabulary is basic to comprehension; comprehension is basic to intelligent application; good reading habits and interests contribute to, and in part constitute, effective reading. Each item has its place on the cumulative record which attempts to give a developmental picture of a pupil's reading.

A few suggestions as to sources of information on each of these items will aid the person who is to do the recording. Information on vocabulary, adequacy of comprehension, rate, and ability to use material read may be obtained from standardized tests and from teachers' informal tests and observation. Scores on vocabulary may be obtained from standardized tests of vocabulary and from subtests of vocabulary or word meaning included in standardized general reading tests.

Paragraph comprehension and rate of comprehension are measured by practically all standardized tests. Because different tests measure different aspects of reading comprehension, the record should include the name of the test and the functions which it measures as well as the test scores and the age, grade, percentile, scale scores, or other form of norm furnished by the test. With very few exceptions these measures of comprehension represent a composite of reading ability and, when scores for subtests are given, their low reliability should be recognized. The relatively low reliability of tests of rate should be recognized, as well as the fact that a single rate score means little unless the kind of material read and the reader's purpose in reading it are known.

³ Gray, William S. et al. Reading. Review of Educational Research, 7: 501, December 1937.

The ability to follow directions, to draw inference and otherwise to demonstrate critical thinking, and to use material read to solve practical problems are measured by a few standardized tests, most of which are still in experimental form. The quantitative results of standardized tests should, of course, be recorded in the cumulative record and, if space permits, notes on the kinds of errors most frequently made should be added. The more subtle type of comprehension of meanings emphasized in the literature on semantics can be represented in a pupil's cumulative record folder by samples of his analysis of meanings or interpretation of certain passages or exercises.

The results of informal tests and classroom experiences supplement standardized tests and make the record highly practical and functional. The teacher can obtain evidences of a pupil's ability along each of the first four lines in the ongoing activities of every classroom as the pupil participates in discussion, uses references and textbooks, follows directions which the teacher writes on the board or gives out in laboratory classes, and reads to solve his immediate problems and to answer his questions. Observations made by the teacher in these situations can be recorded in simple anecdotal form or in a behavior diary record showing chronologically the pupil's observed progress and difficulties. Samples of his written work as well as anecdotal records may also be included in the cumulative record folder as evidence of maturity in the more subtle aspects of interpretation of meaning and ability to communicate to others what he has read. Some persons show much greater ability to absorb than to express ideas gained from reading. They can identify correctly multiple-choice responses in objective-type tests, but do not have the facility of communicating the thought to others in oral or written form. In answer to the question "What did the author say?" some persons, after reading the passage, can write only a meaningless sentence or two; others are able to communicate only a few isolated and poorly expressed ideas; while others can express clearly and in a creative way the author's complete pattern of thought.⁴ Records of class discussion on books or articles read indicate levels of maturity ranging from opinionated ignorance to a high degree of discrimination in selecting relevant ideas from printed sources and in interpreting and applying them to practical problems.

Records of reading habits and interests may be kept by the pupil in the form of a simple record of books read, with notes as to the interest and value of each to him. Reading interests may also be

⁴ For examples see Strang, Ruth. *Exploration in Reading Patterns*, Chicago, University of Chicago Press, 1942. p. 6-72, 156-69.

indicated by the pupil's response to a list of annotated fictitious titles of books and magazines.⁵

These records may be kept in the cumulative record folder and summarized periodically by the teacher and the pupil. If all available information about a pupil's reading ability is summarized at the end of each year, changes in his reading pattern may be studied. The newer psychology and pedagogy with emphases on the dynamics of personality demand a record in which a reading pattern showing emphases and interrelationships is substituted for a simple summation of separate items.

In the primary grades the pattern of intellectual, physical, emotional, social, and environmental factors which is represented by the general term "reading readiness" has been useful in helping each child to make maximum progress in learning to read appropriate material. In the upper grades of elementary school, in high school and college, and in adult years, such factors as the availability and readability of printed materials, the vocational and social needs of the individual, his interests and predispositions, reading proficiencies, and recreational preferences may be fused into significant individual reading patterns.⁶ Patterns of this kind are as yet seldom found in a pupil's cumulative record folder. Yet a series of these patterns, year after year, would give the most comprehensive and dynamic picture of his development with respect to reading or other school achievement.

Although the problem of reading becomes more complex as the child progresses through school, each of the six types of measures has importance throughout the school years. For example, from the beginning, children should be taught to think of reading as functional, i. e., as a means by which they can find out what to do and how to do it, solve simple problems, and answer their real questions. In upper elementary grades and in high school, pupils will use reading to solve more difficult problems, to follow more complicated directions, to draw more perspicacious inferences and conclusions, and to achieve more discriminating appreciation.

Reading habits and interests likewise will change from year to year as new demands are made upon the individual's time, as his interests broaden or narrow through specialization, as additional avenues of learning open to him, and as vocational and social responsibilities demand certain kinds of reading.

⁵ For this type of interest test on the elementary level see Thorndike, Robert L. *Children's Reading Interests*. New York; Bureau of Publications, Teachers College, Columbia University, 1941; and on the high-school and adult level, Strang, Ruth. *Exploration in Reading Patterns*, Chicago; University of Chicago Press, 1942.

⁶ Strang. *Op. cit.*, p. 1-92.

Diagnostic Reading Records

Although the developmental records already described have considerable diagnostic value, they are not adequate in dealing with retarded readers in corrective and remedial classes or with clinical cases. In these situations diagnostic records are necessary. The diagnostic reading record aims to provide an understanding of the causes of a reading difficulty through a study of interrelated constitutional, intellectual, emotional, educational, and environmental factors.

It is suggested that the diagnostic record, using the developmental record as a base, include the following types of items:

1. Defects of vision, especially visual acuity, astigmatism, restricted visual fields, certain fusion and accommodation difficulties, incoordination of the eyes, and possibly aniseikonia (a difference in size or shape of the images of the two eyes)
2. Auditory defects
3. Background of experience, including nationality
4. School history, especially reading history
5. Extent of ability to sustain attention
6. Specific errors made in oral reading, such as insertion and omission of words, errors on small words, inaccurate guessing, poor enunciation, inadequate phrasing
7. Specific errors made in silent reading
8. Emotional maladjustment

There is some experimental basis for including each of these factors on the diagnostic record.⁷

The visual defects specifically mentioned have been found to occur more frequently among poor readers than among good readers in the elementary school. Although experimental work on the upper educational levels does not clearly differentiate groups of readers on the basis of a single visual factor, visual defects have been shown to be of major importance in individual cases; and, in many cases, they undoubtedly hinder effective and comfortable reading.

Auditory defects likewise have been shown to be associated with poor reading, especially in the case of children taught by the phonetic method.

Environmental and training factors appear to be the sources of reading difficulty in some individual cases. Witty and Kopel⁸ reported a meager background of experience to be a contributory factor in 82 percent of the case studies of reading difficulty which they analyzed. There is also evidence that children speaking the lan-

⁷ For details of investigations see William S. Gray, *Ed.* Reading in General Education, Washington, D. C., American Council on Education, 1940. Ch. IX.

⁸ Witty, Paul A., and Kopel, David. Causation and Diagnosis of Reading Disability, *Journal of Psychology*, 2: 161-91, February 1936.

guage of their foreign-born parents may be definitely handicapped in reading, and require adjustment of instruction to their needs. Although at present it is impossible to generalize regarding the effect of any single environmental or training factor on an individual's reading ability, important clues for correction are often obtained from this kind of knowledge.

In the study by Witty and Kopel previously mentioned, inability to sustain attention for a desired end was reported as a contributing factor in reading difficulty.

Specific errors in oral and silent reading may be ascertained from an analysis of pupils' performance on reading tests or by means of interviews in which pupils give introspective reports of their efforts to comprehend a passage. The type of error will vary with the age of the pupils, the kind of reading material, and other factors.

Emotional maladjustment may be either a cause or a result of reading disability. It is probably true that affective factors enter to some extent into every case and are the central problem in many cases of serious reading difficulty.

A reading difficulty may grow out of the complex pattern of conditions involving any individual and his environment. Accordingly, the diagnostic record, in addition to space for recording information on the item suggested, should provide blank space in which to describe the unique, persistent, and pervasive factors operating in an individual case.

Uses of Reading Records

What has already been said about the use of records in general, likewise applies to the continuous record of a pupil's progress in reading. Because, in both elementary school and high school, "every teacher is a reading teacher," this record will be useful to teachers of every subject. From a periodic study of the developmental cumulative records the teacher may increase his understanding of the individual's maturity in rate and adequacy of comprehension, in communication of ideas gained from reading, in critical thinking, in interests and appreciations. From the diagnostic records the teacher may gain an understanding of factors contributing to the pupil's lack of other school achievement. This knowledge enables the teacher to make adjustments to the pupil's needs and limitations when he begins to read and as he progresses through elementary and high-school years.

The teacher may use the developmental reading record somewhat as follows:

1. Note the general trend and level of the pupil's reading ability in order to know whether to expect him to read the text and reference materials appropriate to the group.

2. Study the record for clues as to phases of reading in which the pupil is particularly strong or weak.
3. Examine the pupil's record of voluntary reading to ascertain his maturity in reading interests and appreciation. For example, the ninth-grade boy who devoted his leisure time to the reading of comic books represents a different maturity of interest than the girl of the same age who was reading juvenile series. These two pupils are many degrees removed from the sophisticated adolescent who was reading *My Son's Wife* and Bernard Shaw's plays. The examination of these reading records often indicates the extent of the gaps between what a pupil really enjoys, what material is accessible to him, and the type of reading that is expected of him.
4. Examine the pupil's cumulative record as a whole for indications of the causes of poor reading ability revealed in intelligence test scores, home background, school history, health, general interests, and attitudes. From these sources, as well as from daily contact with pupils, a teacher may find key centers of interest which will unlock a reserve of effort and direct it toward learning to read material that has meaning, use, and purpose.

The teacher of special remedial or corrective reading classes will use the developmental reading record and the pupil cumulative record as a whole as a basis for more intensive diagnostic study as he works with pupils individually and in groups.

The counselor and administrator will find the reading record of great value in dealing with problems of failure in academic work. The reading record may help them to put their finger immediately on an important factor in failure and to suggest a constructive line of action. The record will also be valuable in helping the older pupil to appraise his chances of success in college and the possibility of bringing his reading proficiency up to college requirements.

Psychologist, visiting teacher, nurse, doctor, and other specialists employed in the school or school system will likewise be interested in the reading record because, as was stated at the beginning of this chapter, reading ability is an important factor in the total adjustment of school children. The analytical approach to the improvement of reading through cumulative records applies with equal force to mathematics, oral and written expression, spelling, and other basic skills. More and more, testing, observing, and similar approaches to appraisal of pupil development are becoming an intrinsic part of the instructional program.

CHAPTER VII

Use of Records With Parents

By ETHEL KAWIN

IN THE CHAPTER on the use of records in the elementary school, various ways were suggested in which records are valuable to the school in its relationships to parents. As Wofford pointed out (in the quotation cited from *Modern Education in the Rural School*), "Once the record is made, it should help interpret the individual child to many people; first of all, to himself and to his parents; second, to his teacher," and so forth. Wofford puts the child and his parents before his teachers in this instance. While most of us are likely to think of the primary purpose of a school record as helping successive teachers to understand the child, we would probably agree that in the ideal situation each teacher would make his greatest contribution ultimately in helping parents to understand the child and the child to understand himself.

A parent-teacher interview for each new pupil was advocated, in the chapter on elementary school records, as a means of getting the individual cumulative pupil record well started, shortly after the child's entrance to the elementary school. Driscoll¹ points out the value of parent conferences as a fertile source for teachers in gaining insight into the behavior of particular children. She also discusses the barriers often existing between parents and teachers which prevent their mutually helpful cooperation. She suggests some criteria for successful parent-teacher conferences and lists some valuable clues to the underlying causes of children's behavior which parents often give to teachers. These are some of the significant points which the teacher will want to put in the child's cumulative record.

Innumerable illustrations could be cited of the many ways in which the information gained in such a conference may be of mutual value to home and school in their guidance of a young child making his first school adjustments. For example, the mother may say, "Tom has had very few opportunities for contacts with other children. He is an only child with no close relatives of his own age. In the neigh-

¹ Driscoll, Gertrude. *How to Study the Behavior of Children*. New York, Bureau of Publications, Teachers College, Columbia University, 1941.

borhood in which we have been living there were no small children, so that when we moved here a few weeks ago he did not know how to make friends with the children here. He was afraid of them; they took advantage of that—as children will—by teasing him. Two who annoyed him most are now in his room at school and that seems to be blocking his adjustment to the whole group. Is there anything you can do to help him over this unfortunate hurdle?"

Such a background sketched briefly by a mother will help the teacher to understand this new, frightened little pupil. She may handle the situation in the schoolroom in a variety of ways; she may suggest to the mother that one or two classmates be invited to the home to play with Tom or go with him for some Saturday amusement jaunt. In any event, the problem of Tom's social adjustment, with the apparent reasons for it, will be noted in his record so that his progress in overcoming it will be watched and checked in the record from time to time. Such a "poor start" might seriously influence a child's later adjustments if not understood and wisely handled early in his school career.

Or a teacher may say, "I have noted in my record of Mary that she asks to leave the room with what seems unwarranted frequency. Is it necessary? Should I always let her go?" The mother then explains that Mary has recently been ill; a residue of her ailment seems to be a bladder weakness, which the doctor hopes will be only temporary, but frequent urination does occur at present, so that going to the toilet often is necessary if unpleasant "accidents" are to be avoided. This knowledge, jotted down in Mary's record after this interview, is important if those who are in charge of her in school are to keep her comfortable, happy, and free from humiliating incidents. If the difficulty persists, the teacher will want to ask the mother about it again, at some later date.

Another mother may say, "John's father is an unusually capable person who always holds standards which are really too high for a young child. No matter what John does—if he draws a picture, or spins a top, or builds a house of blocks—his Daddy always points out the weaknesses and mistakes in the performance, instead of finding the achievements. I have seen John discouraged as a result of this criticism, but I can't seem to get my husband to understand that a child also needs to feel success and encouragement in learning new activities. Have you noticed in school that John seems afraid to undertake new activities?" The teacher's record will in all probability show that she has observed reluctance to enter into new situations; she has probably been puzzled by this attitude in an obviously bright, capable little boy. Following this interview with the mother, John's record should indicate that he needs encouragement and ap-

proval for even small successes; it might also note: "There is a parent-education job to be done with John's father, so that he will substitute positive for negative attitudes toward his little boy's accomplishments."

Cumulative Record Data and the Conference Form of Reporting to Parents

These few illustrations will probably serve to show how the use of records in contacts with parents gets off to a good start through information gathered and exchanged in a parent-teacher interview shortly after a new pupil enters school. But such interviews are not limited to these first contacts concerning new pupils. Schools which are progressive in their methods are stressing frequent parent-teacher contacts throughout the school years as important aspects of increasing home-school cooperation. Parent conferences are being used as one form of "school reports" to parents; in fact there is a definite trend of this kind in the development of new types of reports on children's school progress. In the Foreword to its Bulletin on *Reporting to Parents* the New York State Association of Elementary Principals² states:

During the 5-year period 1930-35 more than half of the city and village superintendencies of New York State made some revision of their system of reporting to parents. That process has continued, so that today there is the widest possible variation in practice, from the use of the old-fashioned monthly report card with its percentage marks to dependence almost exclusively upon the personal interview method of reporting.

It seems likely that the practice of using the conference form of reporting has spread and increased since the New York report was issued. The principals who cooperated in the New York report were of the opinion that "the personal interview is far and away the most approved means of reporting to parents which is available" (p. 46; p. 90). However, the report advocates that differentiation in the methods of contact used in making reports should be encouraged. Reporting through conferences is especially favored when rather lengthy material is to be covered; conferences also offer the greatest opportunity for informing parents of the basis of comparison being used in making reports—such as the national grade standard, the achievement of the child's own class or group, or the child's own growth in achievement and adjustment.

The advantages and disadvantages of various methods of reporting to parents are discussed under, "Types of Reports" in the A. C. E.

² New York State Association of Elementary Principals. *Reporting to Parents*. Bulletin VI, December 1938.

Bulletin on *Records and Reports*,³ and the general parental approval of the conference method is pointed out. But whatever the methods of reporting used, satisfactory reporting is largely dependent upon the quality and comprehensiveness of the *recorded data upon which the teacher bases the reports*.

In Glencoe, Ill., where the public elementary schools combine the conference method of reporting at least once a year with written reports sent two or three times a year, suggestions given by the Guidance Counselor to teachers include a review of the pupil's cumulative record by the teacher as preparation for the parent-teacher conference.⁴ Section IV of the Bulletin on Preparation for the Conference reads in part:

"In preparation for any conference an interviewer should have reviewed all data pertinent as background for the conference. He should be reasonably familiar with all information which will facilitate understanding between interviewer and interviewee. In addition, the interviewer should have in his own mind a general, but highly flexible plan for the conference. This plan should be based on the knowledge he has and the objectives he seeks to accomplish through the conference. * * *

Significant things to look for when reviewing a child's record are:

1. What is his family situation? What kind of home life does he have?
2. Has he any significant physical weaknesses or defects?
3. Has he been absent much? If so, why?
4. What have been his greatest "assets"? "Liabilities"?
5. How much ability to do school work does he have?
6. Has he been working up to his capacity?
7. Has he had any special scholastic difficulties, such as reading, arithmetic, etc.?
8. What do the cumulative test records indicate about the child's growth in scholastic achievement? About his achievement as compared with others in his group? As compared with children in general of his own age group?
9. How did he get along scholastically *last year*?
10. How did he get along with his classmates *last year*?
11. Does the cumulative record reveal fairly consistent special abilities, interests, and needs?
12. *What kind of a person is he?*
13. How should a teacher handle him?
14. Has he been developing satisfactorily in his *social* relationships? His *emotional* growth?
15. Has he started the current school year satisfactorily in the light of his preceding history?
16. Are there significant facts in his preschool or school history that a teacher should bear in mind?

³ Casanova, Katherine. Modern Trends in Reporting to Parents. Records and Reports. Bulletin of the Association for Childhood Education, Washington, D. C., 1942. p. 15.

⁴ Kavin, Ethel. Suggestions for Parent-Teacher Conference. Mimeograph Guidance Bulletin No. 2 for 1942-43.

17. Does the record reveal anything about his parents that will guide a teacher in making an understanding and satisfactory approach to them?

This bulletin also stresses the importance of adding some report of the interview itself to the cumulative pupil record:

If the teacher can set aside a few minutes immediately following each interview for jotting down full notes concerning it, he will not have to make many notes during the course of the interview itself. Extensive note-taking during an interview is usually not wise. Certain factual, specific points, or a word or phrase to serve as a reminder to the interviewer when he later records the conference, may be noted during a conference without disturbing the natural flow of an interview. Final recording *after* the interview is, however, an essential part of interviewing techniques.

Constructive Interpretation of Record Data

Records can be invaluable in home-school contacts if the school personnel knows how to use its records wisely and constructively in dealing with parents. No school device is more effective when wisely used, but no material is more likely to antagonize parents if wrongly used. On the whole, no school record should just be handed to parents for them to look over. Selected parts of records should be shown to parents by a member of the school staff who is competent to interpret this material constructively. Much of the objection to records on the part of the parents (and even on the part of some school people themselves) is based on the fear that an unfavorable impression, crystalized in a record form, may not only follow but even precede a child as he goes through school—and all because he “got off on the wrong foot” with some particular teacher! A fear of these negative effects of records has no place in a school which understands these dangers and deliberately avoids them. Avoidance of them will lie largely in the spirit and philosophy of the school personnel, but certain techniques will also prove efficacious.

For example, some positive, favorable comments should be made about a child in practically every instance before negative or unfavorable facts are recorded. Every child has “assets” as well as “liabilities.” Especially in dealing with parents, the favorable items should always be presented first, thus making the undesirable items about their offspring more acceptable to fathers and mothers.

It will also be helpful if parents can be assured that the child's new teacher will not be prejudiced against the youngster by the negative comments of a preceding teacher. This point brings us to a question about which one hears differences of opinion. Will a record which contains reports of personality and behavior problems help a child's new teacher to help that child or will it bias the teacher in his judgment of the pupil? The danger of this latter result is considered

so serious that it is actually cited occasionally, as an argument against using cumulative records in schools. As teachers develop increasingly professional attitudes, the danger of such negative effects becomes less and less. In situations in which teachers feel that they may be prejudiced by predecessor's reports, the danger may be avoided if certain parts of a record—notably predecessor's opinions of a child's personality and behavior—are not made available to the child's new teacher until the latter has had a chance to form and record his own opinion of the pupil. This is feasible, of course, only if the new teacher's judgments are recorded quite early in the school year.

An encouraging statement in regard to teachers' attitudes on this question is found in Robert Abbott's report on the records used in the Horace Mann School of Oakland, Calif., of which he is principal.

At Horace Mann School, while agreeing thoroughly with the ends to be obtained by the Individual Guidance Book, some of the faculty favored a card system in which the findings of one teacher might be passed on to another within the school. We felt that as a group we would profit for the child's benefit in knowing the problems each child faces. We did not feel that a child in going on to a new teacher within the school should be given a "clean slate." The "clean slate" theory is that no child should suffer from the prejudices of the previous teachers. We felt that all of us could be objective enough in our observation of children so that our information would aid another teacher—that we were all professionally minded in our guidance of children. Often one teacher finds a way of dealing with a child that is successful, or discovers information about the out-of-school situation of the child that would lead to an understanding of the child's school reactions. This would be a very real value to the second or third teacher.⁵

With increasingly professional attitudes and methods of work in the field of education, records which reveal children's problems will not endanger the child's "security" so far as the teacher is concerned. In the hands of a truly professional educator such a record serves as a genuine challenge to the adults who seek to know and understand a pupil's difficulties in order to guide and help him.

Objective Records an Aid in Helping Parents To See Their Child With Reasonable Objectivity

Records which will help parents to see their child with reasonable objectivity should be used to help parents follow their child's school progress and his personality development. They should be used thoughtfully, with care and discretion, beginning at the nursery-school or kindergarten level and continuing throughout the school years.

⁵ Guidance in the Elementary School. Tenth Yearbook of the California Elementary School Principals' Association. Oakland, Calif., Parker School, 10:30, May 1938.

NOTE.—This question is also discussed by Gertrude Driscoll in *How to Study the Behavior of Children*. Bureau of Publications, Teachers College, Columbia University, 1941. p. 78-79.

According to the modern view in child guidance no child is achieving so nearly to capacity or adjusting so satisfactorily that greater achievement or better adjustment in some phases of his development may not be possible. Therefore, records should be kept for every child so that under wise guidance every child may develop to his highest potentialities. However minor the problem or the need for understanding guidance, to a parent it will be important because it concerns the welfare and happiness of his or her own child.

While parents are almost entirely dependent upon the school for information as to their child's development in academic achievement, that is not the only area in which the school should function as a major source of guidance to parents. It is to the school that parents must look as their chief source of information concerning their child's reactions as a member of a group other than the family. From the school they should get considerable information about his physical health, his mental health, his special interests and abilities, his handicaps, or special disabilities. To the school also, they must look for much of their information on the child's developing character traits and habits of work. Few parents have any real knowledge of child development or child training; few parents have any agency other than the school to which they can naturally turn for help in these fields. The school, with its trained personnel, should make every effort to meet parental needs for guidance in the guidance of their children. Whether the problem be nail-biting, thumb-sucking, inability to get along with other children, or a special reading disability, the school which accumulates careful, objective records should be able to be helpful to parents in solving problems which are common among growing boys and girls.

It is in the opportunity to learn about his child in relation to a group of children of similar age that a parent can be helped to see his child with reasonable objectivity, so that he does not hold unreasonable expectations for his child. Groups records in which *other* children are not *identifiable* may be in some instances an effective technique for this purpose.

For example, parents are often inclined to blame a first-grade teacher for their child's failure to make the reading progress made by other children in her group. If a table or a chart showing the relative "readiness" of all members of the group for first-grade experiences is shown to such parents, they are likely to gain new understandings of the situation. If these parents see that their child was only in the fifth or tenth *percentile* on an objective readiness test given to his class shortly after the group entered the first grade, they will understand that he cannot be expected to progress as rapidly as most of the children in the group.

A very effective use of individual and group record data is made in some schools when parents raise the question of accelerating their child through a possible "special promotion." The child's position in his present group is compared with the position he would have in the new group were he to be advanced a grade. These comparisons are made in terms of rank order (usually percentile rank) in regard to such recorded factors as chronological age, mental age, physical development, "readiness," scholastic achievement, and social and emotional development.

This type of procedure is described by Olson in an article entitled, "Parents Request an Extra Promotion."⁶ In the case described by Olson, objective record data presented to the parents indicated quite clearly that their son, if left in his present kindergarten group, could easily assume and maintain a position of leadership, whereas if accelerated to the first grade he would be in a relatively mediocre position among older and more mature children. The decision was then put up to the parents who—as might be expected—saw the wisdom of letting their little boy remain in the kindergarten.

Such data, presented in a *status graph* or *profile* (illustrated in Olson's article), are extremely useful in parent conferences involving requests for extra promotion at practically any grade level. Such materials are also useful in cases in which a child's immaturity suggests that he might profit by joining a younger group. In such instances, it may be more tactful to stress the child's own slow growth and his need for a feeling of adequacy for the tasks expected of him, rather than "rank order" comparisons with other children, since parents of an immature or slow-learning child may be very sensitive to comparisons.

Presenting Problems to Parents

A pupil's individual cumulative record may be used by counselors and teachers to help parents in seeing and understanding their child's difficulties and problems. Possible causes of problems and effective methods of dealing with maladjustments may also be indicated through a wise use of careful records.

However, the utmost tact is needed when using objective data about pupils with parents. It is helpful, if, in this contact with the parents, the child's abilities are commented upon before his deficiencies are pointed out. Since all children have some desirable characteristics and some abilities, it is not difficult to give parents the satisfaction which comes with recognition of their child's assets before asking them

⁶ Olson, Willard C. Parents Request an Extra Promotion. *Childhood Education*, 18: 24-28, September 1941.

to face whatever disappointment may be entailed in facing his limitations.

There is one type of data which requires particular tact in its use with parents, i. e., the results of intelligence tests. Most psychologists agree that it is wiser not to give specific figures on intelligence quotients. Most parents are not likely to understand their true meaning, real significance, nor correct interpretation. General classifications, such as "above average," "average," or "below average" will suffice in most instances. In many cases it is better not to use the term "intelligence"; especially in discussing a child whose I. Q. is low, it is often better to speak of him as a "slow-learning child" rather than a child of low intelligence.

It is obvious that the use of cumulative pupil records in dealing with parents is a matter of great importance. Records become highly effective instruments to aid schools in the guidance of both parents and children when data are wisely and constructively used, but they are not tools to be lightly or casually handled! Records are basic and essential to the newer type of parent-school cooperation. But the record must remain only an instrument to serve parent and school in their cooperative efforts to help the child.

In any educator's approach to any problem parents should be able to feel: First, that the school's opinions are soundly based on observation and knowledge of the child under consideration; second, that the school personnel has knowledge of and actual experience in dealing with the problem under consideration, but that they are genuinely humble in frankly recognizing how much is still to be learned about most of our complex educational questions; third, that the school is primarily motivated by a sincere desire to do what is best for each boy and girl, and that records are merely instruments primarily designed for that purpose; four, that the school regards the parent as an intelligent person capable of understanding and anxious to do what is desirable for the child.

CHAPTER VIII

Relationship of Cumulative Records To Follow-up Studies

By HOWARD C. SEYMOUR

DURING the last decade considerable emphasis has been placed by school personnel upon follow-up studies of pupils a year or more after they have left school. This research method is in line with the democratic concept that those who are the "consumers" in an educational program are in a strategic position to point out its strengths and weaknesses. Follow-up studies have the following objectives:

1. To discover the educational or work status of former pupils at a definitely stated period after their formal education in high school is completed.
2. To seek suggestions from graduates and drop-outs as to how school counseling could have been more helpful, where emphasis in guidance procedures should now be placed, and to point out gaps in the present guidance program.
3. To suggest to school administrators and others in whose charge rests the formulation of the curriculum, changes that should be made in the light of pupils' post-school experiences.

Many important changes in school programs and in guidance techniques have occurred where follow-up programs have been carried out.

Adequate cumulative records are essential in interpreting data acquired through follow-up programs. It is obvious that determining the employment status of graduates 1 or more years out of school without comparing the data with the collected evidence of the cumulative record will result in description without analysis. This reduces the chance that such information will be used constructively to make desirable changes in school curricula and methods. To be of greatest value, then, a follow-up study must begin with the acquisition of pertinent data about the individual *while he is in school*.

What Items in the Cumulative Record Are Essential to a Thorough Analysis of Follow-Up Study Returns?

Since extensive use of the follow-up technique is relatively recent, little material is available to show what cumulative record data must be acquired before a follow-up study is undertaken. In addition to the material presented in this chapter the reader is referred to the

material summarized by Dr. J. Cayce Morrison, of the New York State Education Department,¹ and that which the writer has used in making follow-up studies in Rochester, N. Y.²

BOARD OF EDUCATION

GUIDANCE DEPARTMENT

ROCHESTER, NEW YORK

Rochester Follow-Up Studies

PART I

Dear Friend:

Your high school is interested in your activities after you leave school. Approximately one year after you graduate from or leave school, you will receive a letter from your principal enclosing a sheet upon which you will be asked to check several questions. Very little writing will be required. It will take only a few minutes of your time to complete. A stamped addressed envelope will be furnished you.

You may well ask, "Why is this necessary?" Whether you work or continue your education your experiences after leaving high school suggest to you and to us how we might better have prepared you. Your after-high school career indicates to us changes that ought to be made in school programs; how your advisers, counselors, and teachers could have helped you to plan your courses, choose your career, or to obtain work, and other ways in which the schools can be improved.

We are counting on your co-operation a year from now when you receive your principal's letter. In order that we may interpret your replies we are asking you to complete the data asked for below.

Sincerely yours,

H. C. Seymour, *Director*
Guidance Department

Name..... School..... Home Room.....
(last) (first)

Address..... Date of Leaving.....
mo. day year

Last Grade Completed: 1 2 3 4 5 6 7 8 9 10 11 12 Date of Birth.....
mo. day year

Graduated Male Female
(circle items which apply) C. A.
yr. mo.

Please check below each of the following in which you have a major or minor sequence:

Major (3 units)	Minor (2 units)	For Counselors Only	Do Not Write Here
Foreign Language	Foreign Language	Course.....	
Mathematics	Mathematics	Remarks:	48.....
Science	Science		49 50 51
Social Studies	Social Studies		52 53 54 55
General Clerical	General Clerical		56 57 58 59
Stenographic	Stenographic		60.....
Retailing	Retailing		61 62 63
Music	Music		
Industrial Arts	Industrial Arts		
Home Economics	Home Economics		
Fine Arts	Fine Arts		
Vocational	Vocational		
		NR.....	
		A B C+ C C- D D- E	
		Counselor.....	

What occupation have you chosen?.....

When did you make this choice? Before Grade 7 8 9 10 11 12 Still Undecided
(circle one)

(over)

Figure 1

¹ Youth, The First Year Out of School. State Education Department, Albany, N. Y.

² We Left School A Year Ago. Board of Education, Rochester, N. Y.

In the space below are two check lists. Please check the number of years in high school you have spent in each shop. Please note the difference between Practical Arts and Vocational. Practical Arts refers to a shop taken 1 or 2 periods a day. Vocational refers to a shop taken 3 hours per day. Be sure to check all the shops in which you have had training, and to indicate the number of years. If the shop in which you have worked is not listed, please write its name in the blank space below the printed list.

No. Yrs.	PRACTICAL ARTS (1 or 2 periods per day)	No. Yrs.	VOCATIONAL (3 hours per day)	Do Not Write Here
	Architectural Design and Modern Building		Auto Mechanics	
	Art Craft		Auto Mechanics and Diesel Engine	64 65
	Auto Mechanics		Baking	
	Aviation Ground School		Brush Making	66 67
	Cabinet		Cabinet Making	
	Child Care		Commercial Art	
	Clothing and Textiles (Sewing)		Commercial Foods	
	Commercial Art		Cosmetology and Hairdressing	
	Drafting		Drafting	
	Electricity		Electricity	
	Family Life		Horticulture	
	Food and Nutrition (Cooking)		Industrial Chemistry and Plastics	
	General Shop		Leather Goods Manufacturing	
	Home Furnishing		Lithography	
	Home Nursing		Machine Shop	
	Horticulture		Moulding and Foundry	68 69
	Machine Shop		Painting and Decorating	
	Pattern Making		Pattern Making	
	Photography		Photography	
	Printing		Practical Nursing	70 71
	Sheet Metal		Printing	
			Sheet Metal	
			Sheet Metal and Air Conditioning	72 73
			Shoe Cutting	
			Shoe Making	
			Shoe Repair	74
			Tailoring	
			Vocational Home Making	75
			Welding	
			Wood Carving and Upholstery	
			Wood Finishing	

List the clubs you have engaged in in high school:

Clubs	At What Grades?	Honors	At What Grades?

Athletics: Please write the letter L under each grade during which you earned a letter in the sport you have listed.

Name of Sport	8	9	10	11	12

Extent to which you participated in:

	No. of Years
Choir	
Voice Training	
Instrumental Music	

FOR DROP-OUTS ONLY*
If you are leaving school, check one main reason which best applies. (Fill in one if you choose.)

<input type="checkbox"/> All my friends are out of school.
<input type="checkbox"/> I prefer working to going to school.
<input type="checkbox"/> I need the money.
<input type="checkbox"/> My family needs the money.
<input type="checkbox"/> I dislike a certain subject (which one?)
<input type="checkbox"/> I can learn more on the job.
<input type="checkbox"/> I was expelled or suspended.
<input type="checkbox"/> I dislike school.

Comments:

I shall be glad to cooperate a year from now by answering my principal's letter.

EVG-19

signature

Figure 2

[illegible]

Figure 3

Figure 4

Figure 4

RELATIONSHIP OF CUMULATIVE RECORDS TO FOLLOW-UP STUDIES 67

Printed, Nov., 1941

STUDY OF YOUTH WHO HAVE LEFT SCHOOL

No.

School

Part II

To Former School Pupils:

194

Your school wishes to keep in touch with its former pupils and to profit from their experience in making its program more useful to the boys and girls now in school. Your experience will help us understand better the problems other boys and girls will face when they leave school.

Please record on the following schedule, as accurately as you can, the information requested. Your responses will be held in strict confidence.

To make it easy for you to reply, we have purposely made this form brief. But if you have any additional suggestions for making the school more useful to young people, please write them on a separate sheet and attach it to this one. Better still, we should be pleased if you would call on us to talk over your experiences and your problems since leaving school.

An immediate reply will be greatly appreciated. Please use the enclosed return envelope.

Yours very truly,

Schedule of Information

<p>Name * { Mr. { Mrs. { Miss * Cross out two. If Mrs., give maiden name below.</p> <p>Present mailing address</p> <p>Post Office</p> <p>1. Date of birth. Yr. Mo. Day</p> <p>2. Last grade completed in school: 7 8 9 10 11 12 P.G. (Circle one). (1) (2) (2-1) (4) (4-1)</p> <p>3. How are you now occupied? (Check one or explain). (1) In school full time (2) In school part time (2-1) Employed for wages outside home Employed by NYA, CCC, WPA (circle correct one) (3) (4-1) (4-2) (4-2-1) Employed for wages at home (3) Employed at home without wages (3-1) Operating a farm or business for self (3-2) Unemployed (3-2-1) In military or naval service of the U. S. If none of these, please explain.....</p> <p>4. Are you: (Check one or explain). (1) Single (2) Married (2-1) Separated (4) Widowed (4-1) Divorced</p>	<p>5. If you are still going to school check the type of institution and give the name of the school.</p> <p>(1) College of liberal arts or science..... (2) Prelaw (2-1) Premedical or dentistry..... (4) Other professional school..... (4-1) Technical school or college..... (4-2) Normal school or teachers college..... (4-2-1) Nurse training school..... (3) Business school or college..... (3-1) State School of Agriculture or Home Economics</p> <p>If none of these, explain here or answer in question 6 below</p> <p>6. If you have done any systematic studying or schooling other than the above, check type and give name of school.</p> <p>(x-1) Evening school..... (x-2) Apprentice training..... (x-2-1) Correspondence course..... (x-4) Part-time day school..... (x-4-1) Postgraduate course in high school..... (x-4-2) Private trade school (e. g., Diesel engine, cosmetology) (x-4-2-1) Public vocational school..... (x-8) Other. Explain.....</p>
--	--

NOTE: If you have not held any job since leaving school omit questions 7, 8, 9, 10 and 11 and go on to question 12.

7. Please give in the spaces below the information about jobs you have held since leaving school.

Firm or Employer	Business or Product	Title of Job or Kind of Work	Full Time	Part Time	Date Entered	Date Left	Weekly Wage
(Example) Name: John Doe Co.	Electrical Equipment	Messenger	X		July 1, 1940	Sept. 2, 1940	\$14
Address: 1 Post Road, Newburgh							
Name							
Address							
Name							
Address							
Name							
Address							

Please continue on the other side of sheet.

Figure 5

8. To what extent did your school training help you on your present job? (Check one or explain).

(1) General way only
 (2) Provided some training
 (2-1) Was direct preparation
 (4) None at all. Explain.....

9. Which one of the following helped you most in getting your first job? (Check or explain).

(1) Parents
 (2) Other relatives
 (2-1) A friend
 (4) School office
 (4-1) Teacher or counselor
 (4-2) Answer to an advertisement
 (4-2-1) Own effort by application
 (8) A commercial employment agency
 (8-1) A public employment service
 (8-2) Other (such as NYA, CCC, YMCA)
 (8-2-1) Explain.....

10. Chief reason for leaving your first job? (Check one or explain).

(1) Slack business conditions
 (2) End of temporary job
 (2-1) Didn't like work
 (4) To take a better job
 (4-1) Too little pay
 (4-2) Poor working conditions
 (4-2-1) To look for better job
 (8) Ill health or accident
 (8-1) Discharged
 (8-2) Other. Explain.....

NOTE: If you are unemployed now, omit question 11 and go on to question 12.

11. In what way will your present job help you most in finding a better job? (Check one or explain).

(1) Provide you with money for further education or training
 (2) Provide experience and training for promotion
 (2-1) Provide opportunity to demonstrate ability
 (4) Will not help you to better job
 (4-1) Other. Explain.....

12. Have you made plans for further education?
 Yes..... No..... If "yes," specify.....
 (Slot)

13. What person or influence has helped you most in making your educational plans?

(1) Parents
 (2) Other relatives
 (2-1) Friends
 (4) A teacher
 (4-1) School principal
 (4-2) School counselor
 (4-2-1) Something you read
 (8) Courses you studied
 (8-1) Employer
 (8-2) Other. Explain.....

14. Have you made plans for your future line of work (Vocation)? Yes..... No..... Specify.....
 (Slot)

15. What person or influence has helped you most in arriving at your decision? (Check one or explain).

(1) Parents
 (2) Other relatives
 (2-1) Friends
 (4) A teacher
 (4-1) School principal
 (4-2) School counselor
 (4-2-1) Something you read
 (8) Courses you studied
 (8-1) Employer
 (8-2) Other. Explain.....

16. Which subjects or activities in school helped you:

Most	Least
(1)	(1)
(2)	(2)
(3)	(3)

17. Your school counseling could have helped you in the ways listed below. Please check the one that proved most helpful to you.

(1) How to apply for a job
 (2) How to get along with the boss
 (2-1) Understanding of working conditions (labor unions, workmen's compensation, social security etc.)
 (4) What wages and hours to be expected
 (4-1) Making contacts with job-finding agencies, (Junior Placement Service, YMCA etc.)
 (4-2) Select proper courses while in school
 (4-2-1) Plan for further education
 (8) Advised against high pressure salesmanship or "gyp" schools
 (8-1) Planning for the work you are doing

18. In what way could your school have helped you more? (Check one and explain).

(1) More specific training for a job. Explain.....
 (2) More instruction concerning how to get a job. Explain.....
 (2-1) More specific advice in planning your further education. Explain.....
 (4) More specific advice on social living. Explain.....
 (4-1) Opportunity to return to a public school for special training. Explain.....

If you believe that the school could have helped you in ways not mentioned in questions 17 and 18 please tell us about them below in question 19.

19. Please record here or on separate sheet any suggestions which you believe would help your school to be more useful to boys and girls now in school.....

Figure 6

A STUDY OF YOUTH IN THEIR THIRD YEAR OUT OF SCHOOL
SCHEDULE 3

THE UNIVERSITY OF THE STATE OF NEW YORK
THE STATE EDUCATION DEPARTMENT
ALBANY

School..... No.....
City or Village..... Date.....

Name * ☐ Mr ☐ Miss ☐ Mrs [First] [Middle] [Last] [If married, write maiden name]
*Cross out two
Present mailing address..... [No.] [Street] [City or Town] [State]
[If in armed service, give service address]
Permanent mailing address..... [No.] [Street] [City or Town] [State]
Age at last birthday..... Last grade completed in our school Did you graduate?
[Circle one] 7 8 9 10 11 12 P.G. Yes..... No.....

Directions: There are 15 questions. Please read carefully the instruction for each question and record as accurately as you can the information requested.

Do Not Write Here	1 Are you: (check one) (1) Single? (2) Married? (3) Separated? (4) Widowed? (5) Divorced?	Do Not Write Here	4 If you have been or are now engaged in systematic study other than the above check in space(s) provided below and give name(s) of school(s). Type of study Name of school (1) None (2) Evening school (3) Apprentice training (4) Correspondence course (5) Postgraduate course in high school (6) Technical or trade school (Diesel engine, cosmetology etc.) (7) Business school (8) Summer school (9) Vocational training for war production (Defense classes) (10) Other. Explain.....
	2a Check one of the following: (1) Am unemployed (2) In school or college full time (not available for employment) (3) Keeping house, married, at home (not available for employment) (4) In the armed services (5) Am employed, not attending school or college (6) Am employed and attending school or college 2b If employed, check one of the following: (1) Employed full time (35 hours a week or more) for wages outside the home (2) Employed part time (less than 35 hours a week) for wages outside the home (3) Operating a farm or business for self or in partnership (4) Employed in own or parents' home or farm for board and room only (5) Employed in own or parents' home or farm for wages (6) Other. Explain.....		5 For what peace time job or occupation have you been preparing?
Do Not Write Here	3 If you have attended or are attending college or other institution of higher learning, check type of school below, and opposite write the name of the institution. Name of school (1) College (2) Junior college (3) Normal school or teachers college (4) Nurse training school (5) Other. Explain.....	Do Not Write Here	6 If a member of the armed services, have you received (or are you receiving) systematic instruction or schooling? (1) Yes..... (2) No..... If yes, explain..... 7a How many full-time jobs (35 hours a week or more) have you held since you left our school? 7b How many part-time jobs? (less than 35 hours a week)
	Turn sheet and continue		

Figure 7

7c Describe the first civilian job you secured after leaving school and your last or present one. List only full-time jobs (35 hours or more a week).						
	Firm or Employer	Business or product	Title of job or kind of work	Hours a week	Dates beginning and leaving	Weekly wage
First full-time job	Name				Began..... mo. yr.	
	Address				Left..... mo. yr.	
Present or last full-time job	Name				Began..... mo. yr.	
	Address				Left..... mo. yr.	

Do Not Write Here	8 Which one of the following helped you most in getting your present or last civilian job? (1) School (2) Parents or guardian (3) Other relatives or friends (4) U. S. Employment Service (5) Private employment agency (to which you paid a fee) (6) Answer to an advertisement (7) Own effort (8) Other. Explain.....	Do Not Write Here	11 What job or vocation do you eventually want to have after the war? Explain.....
	9a Listed below are guidance services offered by schools. In the light of your experience since leaving school: Mark with an "M" the one which has helped you most Mark with an "L" the one which has helped you least (1) Understanding your own aptitudes and limitations (2) Finding out about occupations and working conditions (3) Helping to choose an occupation (4) Selecting suitable courses in school, or planning further education (5) Finding a job (6) Learning how to work well with associates and how to advance in your vocation		12 Are you planning to obtain further education after the war? If so, explain.....
	9b How could our school improve its guidance service?		13 In terms of your experience since leaving our school, what were the chief values you obtained from school?
Do Not Write Here	10 What subjects or activities in school helped you Most? Least? (1) (1) (2) (2) (3) (3)	Do Not Write Here	14 On the basis of your experience since leaving our school, what changes, if any, do you think would make our schools more useful to boys and girls now in school?
	15 Is there any way this school or a similar school could be more helpful to you now or when the war is ended?		

(If you do not have sufficient space attach an extra sheet to this blank.)

Figure 8

Figures 1 and 2³ is a summary sheet of the pupil's record which he (because of the lack of clerical assistance in the school) is asked to make out during the last month of his senior year or if he drops out of school, at the time of his departure. It is intended to be a summary of his school record. Each counselor is expected to check over this summary to insure that it is accurately done and to insert data from the original cumulative record under the column, "For Counselors Only." Some explanation of the items in this column is necessary. Course refers to college-preparatory, commercial, vocational, or general. NR is a code for nationality, race, or color; and the letters A, B, C, etc. are alphabetical indices of the individual's position in the distribution of intelligence tests scores for age. The data asked for in these illustrations and in those following in this chapter, except

³ The column at the right (fig. 1), under the caption, "Do not write here," is for use in coding their responses on Hollerith cards.

where noted, have been arranged so that coding for Hollerith cards is simplified.

Figures 3 and 4 is a summary of a record for a school system not possessing Hollerith equipment. It is a speed sort card. The individual, before leaving school, fills out the items in the center of the blank. The counselor then punches out the appropriate spaces on the edge of the card. The blank calls for items which may be used later for comparison with the blank which the pupil returns to the school a year or more after he leaves. Figures 5 and 6 are Part II of a blank which is sent to youth 1 year after leaving, and Figures 7 and 8 the one sent 3 years after leaving school. Information acquired from these blanks is then compared with Figures 1 and 2 in order to interpret the data adequately.

Examination of these blanks will indicate quite clearly to the reader the need for data from Part 1 (the summary of school record) before any attempt is made to interpret the statements which young people may make after leaving school.

What Combinations of Items Need To Be Compared To Make Follow-Up Studies Meaningful?

There are almost innumerable comparisons which can be made between items on the cumulative record card and information collected from the follow-up questionnaire or interview. It is sufficient here to suggest the most obvious comparisons simply to show that tabulations of items in themselves without such comparisons are less meaningful. From Part I of the New York State Follow-Up Studies the following items are available:

Age at Leaving School	Course
Grade Completed	Race
Sex	Intelligence Rating
Major Subject	Shops Taken
Minor Subject	Extracurricular Activities

Any one of these summaries of school record items may be compared with another. For example, the investigator may wish to know whether girls remain in school longer than boys or to determine whether there are racial differences among boys in taking shop work. Even more important are the comparisons that may be made between any one of the above-listed items and the responses of pupils a year, 3 years, or 5 years out of school. To list the possibilities would require much space. If the reader will examine carefully the items of information contained in Part II of the New York State blank (Figures 5 and 6) the possibilities for tabulation are apparent. For example, how many pupils in the upper quartile in intelligence actually continue their schooling? Do boys who take auto mechanics secure

work in garages? Do those who drop out of school at an early age earn less than those who remain to graduate? Who helps girls secure their first positions, etc.? The answers to these questions and to others that might well be raised can be secured by comparison of the Cumulative Record Summaries and follow-up responses.

Use of Follow-Up Studies Made by the Placement Offices

Often a Placement Bureau wishes to determine the effectiveness of its placement in order that it may be guided in making future recommendations of pupils. Probably the best way to do this is to send a questionnaire to both the youth and his employer at the end of a few months of employment and at periodical intervals thereafter. To be of value these questionnaires should reveal the occupational success of the individual and the criticisms of employers regarding the abilities shown by the employees. By referring to the individual's cumulative record or a summary of the record, the criticisms of the employers can be checked.

If an employer, for example, makes the criticism that the boy was improperly trained, the placement counselor, to check the validity of the criticism, must examine the cumulative record to determine what courses the individual took. Otherwise, this follow-up procedure is not sufficiently revealing. The value of the data on the cumulative record forms can be determined by relating the success of the individual in his occupation to the data in the cumulative record.

Conclusions

1. Follow-up studies, to be of maximum value, must be used in conjunction with cumulative records gathered during school years.
2. The use of follow-up studies may indicate a need for collecting more adequate data on the cumulative record card while the individual is still in school.
3. Follow-up reports from employers must be compared with cumulative school record items.
4. More extensive use of follow-up studies and their relationship to cumulative school records should be made.

CHAPTER IX

Relationship of Cumulative Records to Placement Office Procedures

By HOWARD C. SEYMOUR

THE Cumulative Record has not had an extensive use as a source of information for occupational placement. No regular procedure has been developed whereby the record itself or a summary of record is routed from school to the employer from whom the applicant is seeking work.

At the present time, great dependence is placed upon the statements which the applicants make upon application forms or upon what is said during the employment interview. In most instances the applicant's statements are not verified, nor are recommendations from school counselors sought. Often the school is censured for having turned out a graduate who, because of a school record, might not have merited unqualified recommendation.

Relating a pupil's cumulative record to his application for and his entrance upon a job benefits the school, the employer, and the pupil. It forces the school to be observant of those factors which industry finds predictive of success on specific jobs. It enables industry to refine its selective procedures by taking account of past experiences of applicants. School pupils soon recognize the value of making satisfactory school records.

The present chapter is devoted to a discussion of how the cumulative record may be used most effectively to help each applicant in the process of securing initial employment and of making progressive readjustments from job to job.¹

Beginning a Cumulative Record in a School System From the Viewpoint of Placement

When a comprehensive cumulative record in a school system is to be introduced or revised, consideration should be given to its use for

¹The writer is indebted to the following directors of guidance for descriptions of the relationship of cumulative records to placement and follow-up programs in their communities: Dr. Richard D. Allen, Assistant Superintendent of Schools, Providence, R. I.; Leona Buchwald, Director of Guidance, Baltimore, Md.; Mary Corre, Director of Guidance, Cincinnati, Ohio; Susan J. Ginn, Director of Guidance, Boston, Mass.; Arthur H. Hitchcock, Director of Guidance, Bristol, Conn.

placement and follow-up purposes. The items to be included should be evaluated not only for school use but also to determine the pupil's qualifications for specific jobs and to help determine how a school program may be improved.

Before a cumulative record is devised, some thought must be given to the plan of operation. In some school systems the cumulative record is summarized after the pupil graduates from or leaves school and the summary is forwarded to the United States Employment Service or other placement agency. Some school systems with their own placement bureaus send the complete cumulative record to the placement office. For example, in Providence, R. I., the school cumulative record is filed in the central records room and requisitioned whenever the placement office interviews an applicant. Other school systems have discovered from experience that it is neither expedient nor practical to transfer the entire cumulative record folder to their own placement organization. Baltimore has found a summary of record more practical and thoroughly adequate. When placement is the responsibility of an agency outside school control, school authorities are reluctant to release a complete record. In the first place, a complete school record may be cumbersome for placement officials to use; that is, it may contain items of information of little predictive value. Secondly, there are demands upon school staff members other than those of the placement office, and the school cannot afford to release the original record.

The progressive school system may be thinking of economical duplication of records so that complete or partial records may be sent out to employers on request. Two methods to be considered are the photostatic process and the microfilm. Either method has its values as well as its limitations, and each school system needs to analyze both methods in the light of its own organization. If properly grouped, items useful to the placement counselor can be photographed or photostated without including a large number of items that are not specifically related to placement or follow-up needs. Items in the cumulative record be so worded that entries will be intelligible to academic personnel in the high school, to the placement counselor in the employment office, and to the employment interviewer in an industrial concern.

How can the cumulative record be used most effectively to aid the pupil who seeks employment immediately upon leaving school? This depends upon the method of placement. The use of the school cumulative record will be discussed in relation to these different methods of placement.

1. *Using the cumulative record in public and private employment offices.*—Such employment offices are so-called "middlemen" since they stand between the institution which educates the person and the

institution which employs him. There is a great chance for error in this type of placement because the employer gets all his information about a worker second hand—i. e., through the employment service. To avoid this it is necessary that the employment office receive as much and as accurate information about an individual, significant for placement, as possible. The U. S. Employment Service is the largest employment agency performing this middleman function. It is its responsibility to acquire all information available about individuals, classify the individuals on the basis of previous experience and training, and match them to job requirements. These individuals are classified in part by what they reveal during the employment interview and in part by a summary of their previous school and experience records.

Applicants for placement at the U. S. Employment Service are usually of two types—first, those who have been at work for some time but who are dissatisfied and wish to make a change; and, secondly, those who have been in school and are seeking their first full-time job. If an individual has already been placed by the U. S. Employment Service, his record can be located in an inactive file. If the applicant wishes to make it active, he will so request, and an employment interviewer will bring the record up to date. If the original employment interview was done carefully, a summary of the school cumulative record will have been made available at the time of the first employment interview, and there will be no need of requesting additional information from the school. The cumulative record, or a summary of record, therefore, becomes a part of the permanent placement record.

Sometimes the school pupil is interviewed for work before he has graduated or before his school record is complete and certainly before he has had opportunity for more than part-time work experience.² Because of the tremendous task of copying school records, these are not always available at the time of the first interview. This is unfortunate since the school record may determine the direction the interview will take. The U. S. Employment Service in Rochester, N. Y., interviews all high-school seniors at the school in the spring before their graduation. At that time they are given access to the cumulative records and consult them before interviewing pupils. In addition, they interview administrative and teaching staff when the need for consultation is indicated. Through this procedure important pertinent data from the school record are transferred to employment office records. This has saved a great deal of clerical labor, has reduced

² For classification of "beginning" workers, see Part IV of the *Dictionary of Occupational Titles*. U. S. Government Printing Office, Washington, D. C., June 1941.

errors due to transcription, and, what is more important, insures the use of the cumulative record at the time of the interview.

Since the U. S. Employment Service acts as an intermediary between the applicant for work and the business establishment, it is pertinent to raise here the question whether a school record secured by the Employment Service should be passed along to the potential employer. Under ideal conditions the employment service should have sufficient copies of the school record to supply interested employers. In this way the schools can come to know which items in their cumulative records are predictive and how useful they are in helping the applicant secure work. This school record must be transferred undigested and unchanged. It must be used as supporting evidence by the employment service in making the recommendation, as objective evidence of the suitability of the applicant for the position and, indirectly, of the shrewdness of the middleman in recommending him for the job.

The private agencies are also middlemen between training institutions and industry. They seek job opportunities and attempt to locate personnel fitted for these jobs. Since income is one object of the private employment agency, it is extremely important that at least from the viewpoints of school, pupil, and employer, complete summaries of school records are located in the agency's files. Otherwise the private agency may be tempted to send out applicants for positions for which their school records show they are not properly qualified.

2. *The use of cumulative records by placement officials in public or private school, college, or university.*—The cumulative record in these institutions either automatically becomes a record for the placement office or a source where placement counselors may readily acquire data. Since the job applicant is usually well known to the placement counselor, there is a much greater likelihood of the cumulative records being used for placement purposes. There is little need for making summaries of pupil records since the cumulative record remains in the institution. In some institutions, when the pupil is graduated, the cumulative record is filed in their own placement office. In Providence, R. I., when a boy or girl graduates or leaves school, the cumulative record is sent to the Central Records Office and may be requested by the school placement counselors when a case becomes active. In Baltimore, Md., the schools have their own placement system and use summaries of school records as sources of information.³ In addition, in their trade schools coordinators for school and industry attempt to make satisfactory placements for pupils who leave school or who grad-

³ The U. S. Employment Service also has its placement service entirely apart from the school's placement bureau.

uate. The pupil's school record therefore becomes the chief source of information used in making placements.

3. *Using the cumulative record when the individual applies for work on his own initiative.*—Long before placement offices existed individuals applied for work "at the plant" or "at the office." They were encouraged to apply in person, often "shopping" for better jobs from plant to plant. It has been a mark of distinction for the individual to say, "I got the job on my own." Since workers often appeared "at the employment gate" in large numbers, industrial and commercial organizations were forced to establish their own employment offices. The usual procedure is to ask the individual to complete an application card or blank at the time of the initial interview. Many employment interviewers use the statements of the individual on the application card as evidence of experience and training without verifying the statements. Most individuals who apply for work intend to state truthfully the extent of their education and experience, but often make overstatements because of their interest in securing employment and because their memories fail them.

As a matter of policy, many managers insist that employment interviewers telephone the school to verify statements made by the applicant. This is better placement procedure than no check at all, but it is still inadequate. How much more objective it would be if the business organization would ask, before a boy is employed, that the school send a summary of his cumulative record to the employment office. Such a procedure would provide specific data about each applicant; it would help to determine what items in the school record are predictive of success in specific occupations; and it would assist the school to interpret to pupils the value of their making satisfactory progress in school.

Whenever a workman fails at the work assigned him, there is the tendency to place the responsibility for the failure upon his school training. In some instances, at least, the school instructor might not have recommended the applicant for the job. An illustration will clarify this point. A boy was hired in one industrial plant for machine operation. When war production increased the demand for workers in the metal trades, the boy was promoted from machine operation to tool making at which subsequently he failed. His foreman maintained that the school had not given him adequate training, but when the summary of the boy's cumulative record was referred to, it was found that the school had recommended against this type of job. This shows that the cumulative record can give valuable information not only for initial employment, but for the second or third job as well. However, too much weight should not be given to the cumulative record after a boy has been in industry

for some time, because the cumulative record is not as yet an infallible guide and because the job is after all the best test of success.

Continued experimentation with the value of school achievement, various aptitude test scores, ratings of extracurricular activities, in relation to success in various occupations should be carried on. Schools should cooperate with employers in the experimentation. The summary of the school record used regularly in the employment office should include only those items the predictive value of which has been proved or which are believed by most psychologists to have predictive value.

Shall the Pupil Carry a Summary of Record With Him?

The objection that most employment interviewers raise when it is suggested that summaries of records be required for every candidate for employment is one of timing. Applicants who appear at the employment office and who in general meet the requirements of a specific job are usually needed immediately. If the job placement interviewer writes to the schools, it is usually 2 or 3 days before the complete records are received. The applicant and his record do not reach the interviewer's office at the same time. Consequently, some agencies have advocated that the applicant carry a summary of his record with him.

In Medford, Mass., Trade School each boy who graduates and who is seeking employment carries a booklet showing the exact shops in which he has taken training, the list of operations which he has performed in each shop, and an estimate of his achievement. The employer thus is presented a clear-cut statement of what the individual has done in school, as well as an estimate of the quality of the work. This is good timing. The boy and his record arrive at the employment office at the same time. Another advantage is the fact that the boy knows exactly what his record shows and is inclined to be much more realistic about applying for the job. Obviously he will not apply for a position if his record shows he is inadequately or poorly trained. The main disadvantage is the danger of forgery.

Cumulative Records and the War

The use of cumulative records by the Army and Navy and by Selective Service has given impetus to the need of better school cumulative records. Recently the Army has devised a card called the "Educational Experience Summary—Secondary School."⁴ The purpose of this summary card is to provide Army Classification

⁴ Educational Experience Summary—Secondary School. War Department, Washington, U. S. Government Printing Office, April 6, 1943.

Center Personnel with a record of the inductee's particular aptitudes and his accomplishments prior to induction. The inductee, as well as the school authorities, helps to complete his record. No information is withheld from the individual. The intent of such a blank is excellent. Heretofore, the Army Reception Centers have had to depend upon the individual's statement regarding his past achievement, his experience, and his preferences. The initial interview has been time-consuming. The least that can be said of this educational experience summary is that it will be an improvement over older and less objective methods of obtaining pertinent information about the individual. The U. S. Office of Education commenting upon the blank explains that the blank (or a similar one to be worked out in the local community) could be used as a summary of record to present to placement officers in industry who heretofore have not made extensive use of the individual's record of school progress. The use of this educational experience summary should result in better cumulative records in schools. Neither school nor individual will be able to complete accurately a summary of record of this type without the existence of a cumulative record kept carefully by both school and individual over a period of years.

A number of Selective Service Boards have begun to take a progressive attitude towards adequate cumulative records. An analysis of their rejections during the first few months of Selective Service convinced them that an attempt should be made to reduce poor selection at the source. Social workers and public-school officials were asked to examine each draftee's personal record to help determine whether he would make satisfactory adjustment in the Army. In Rochester, N. Y., the Board of Education has appointed a full-time vocational counselor for this work. It is his responsibility to examine the school cumulative record for each draft registrant and to report his findings to the social workers who have already examined his social agency records, if such exist. A summary of record is then prepared and sent under seal to the Draft Board psychiatrist. Draft board officials have been enthusiastic about this service. As a result, school officials are beginning to improve their cumulative record system and to insist upon more frequent entries and more adequate evaluation of pupil progress.

What Cumulative Record Items Are Valuable for Placement Purposes

Before discussing the specific items which should be included in the cumulative record and which are useful to the placement interviewer, it is well to discuss briefly a few of the difficulties that are often encountered.

1. Because of varying background and experience, employment interviewers often within the same concern differ as to the value of school training. One employment manager in a prominent machine shop will not employ a high-school graduate unless he has taken a straight college-preparatory course. His experience has taught him that those who take a college-preparatory course are usually quicker to learn. Another interviewer maintains that he will not employ anyone in the shop unless he has been trained in machine-shop practice. Each of these men expects different school subjects to predict success for the same job.

2. There are differences in the interpretation of the same items by different employment interviewers. One employment interviewer pays no attention to attendance in school. Another interviewer maintains that a good attendance record predicts reliable attendance at work.

3. Too little attention has been given to the predictive value of items on the cumulative record. Items have often been included on summaries used by employing offices that are of doubtful validity for placement purposes. For example, some employment interviewers place great value upon the individual's rank in his school or class. Actually the validity of this rank depends entirely upon the size of the school or class and the relation between the ability level of the pupil in the school or class concerned. Since the interviewer does not have access to this information his use of rank in school or class is not only of no value, but in some cases results in erroneous decisions.

4. School personnel and employment interviewers do not understand each other's terminology. Titles of school subjects are often misleading. For example, the subject title "Auto mechanics and Diesel engine" would imply that equal time were given to both areas, whereas, in one school in which this subject is taught approximately 33 weeks is devoted to auto mechanics and 3 weeks to the study of the Diesel engine. Perhaps the day is not too far distant when the employment interviewer will have on his desk a manual to assist him to interpret a summary of school record.

5. Achievement, aptitude, and other test scores have now been used for a number of years in most schools. Results have been expressed in test grade, test age, I. Q., mental age, percentile, and standard score. Employment interviewers must understand these terms as well as the values and limitations of the measuring instruments from which they are derived. They must be able to interpret the results only as research demonstrates they have meaning for specific jobs in their particular industrial or commercial organizations.

These problems are reason enough why more extensive use of specific cumulative record items in predicting job success has not been made. Nevertheless, certain items have value; informational if not predictive.

- (1) *Birthdate*.—If the summary of school record could include the verified birthdate an applicant would not have to lose time obtaining a birth certificate, an absolute necessity in applying for work.
- (2) *School subjects and their marks*.—Excellence in school subjects is a rough measure of the individual's ability, plus his willingness to work hard. Considerable research needs to be done to improve the interpretation of subject marks in their relation to success in specific occupations. School marks are unreliable. Teachers' judgments differ. If such were not the case, school marks would be much more interpretable. At present they must be taken in the large as an indication of general level of ability. The school should furnish descriptive data about school subjects so that employment interviewers may understand qualitative differences between them.
- (3) *Health data*.—No placement counselor ought to employ any youth without an examination of his school health record.
- (4) *The record of part-time work experience*.—A statement of the kind of part-time work experience and the individual's degree of success in it can be very helpful to the employer.⁵
- (5) *Absence and tardiness*.—The number of days absent and the number of days tardy indicate the individual's consistency in attendance at school and may be predictive of his dependability at work.
- (6) *Comments of teachers and advisers*.—Such evaluations are subjective and constitute only an opinion. Nevertheless, such comments have often been more predictive than have more objective data. When three or more raters have made the same observations about an individual, it is generally considered to be reliable evidence.
- (7) *Achievement and aptitude test scores*.—As employment interviewers have come to understand their limitations, test results have become meaningful. Achievement and aptitude test scores are meaningless in themselves unless some attempt has been made to show relationship to job success. If research shows that boys who fall below the twenty-fifth percentile in an intelligence examination do not function satisfactorily as machinists, or that any boy who scores above the fiftieth percentile in a general intelligence test would not be satisfied to work as an elevator operator and, therefore, ought not to be employed, test data from the cumulative record can contribute a great deal to employee selection.
- (8) *Extracurricular activities*.—Hobbies and clubs often indicate the individual's range of experience. They sometimes show whether the individual will fit into the industrial extracurricular program. Whether the individual has been elected to a place of responsibility in school may be indicative of his eligibility for positions of leadership in the industrial organization.
- (9) *Personality ratings*.—Employers invariably ask for evidence of character, dependability, loyalty, etc. Frequently what constitutes a trait is interpreted differently by personnel workers. Placement counselors in Bristol, Conn., have found the personality record the most valuable single item in placing applicants in jobs.

⁵ In Rochester, N. Y., boys who take paper routes are rated by their district managers semi-annually. These records are sent to the schools to include in each boy's cumulative record folder. Employment managers now request these ratings when newsboys apply for work in their organizations.

CHAPTER X

Description of Two Unique Ways in Which Cumulative Records Are Used

By WARREN K. FINDLEY

PREVIOUS CHAPTERS have been devoted to recommendations regarding the development and use of cumulative records in the schools. These recommendations have frequently been accompanied by references to other publications describing specific situations in which cumulative records have functioned in the manner recommended.

This chapter is devoted to the description of ways in which cumulative records have functioned in two specific school systems to further the accomplishment of the objectives of the schools concerned. No claim is made that these are representative or typical situations. Rather, these descriptions are offered as concrete reports of what has been accomplished in particular situations, as the means of conveying to readers of this publication that sort of appreciation of real values in cumulative records that comes from supporting logical recommendations with full descriptions of specific applications. The reader is cautioned against feeling that these descriptions are complete pictures of the working of a cumulative record system. The descriptions of both the teacher conference method and the pupil participation procedures rely upon the type of basic cumulative record material discussed in the other chapters of this bulletin.

USE OF RECORDS AS A WHOLE AS BASIS FOR TEACHER CONFERENCE APPROACH TO PUPIL DEVELOPMENT

The teacher conference is the basic and most prominent feature of the programs of the elementary and secondary schools of one school system where cumulative records are maintained as a background tool for furthering the guidance of child development. Once each week the teachers in touch with the pupils in each grade in the elementary and secondary schools meet for conference over a specified number of pupils in that grade. The meetings in the elementary school are held by choice at 8 o'clock in the morning and last until shortly before school begins

at 8:45. The meetings at the junior-senior high school are held at the close of school at 3 p. m. and last from 45 minutes to upwards of an hour.

To obtain a detailed picture of the programs as they operate and as they make use of cumulative records, let us consider a typical day and its conferences. On Tuesday the teachers in touch with pupils in the fifth grade meet around a conference table at 8 a. m. under the chairmanship of the elementary school principal. The group includes two "basic" teachers, each of whom teaches the basic skills to two classes of 30 pupils. The elementary school program is so scheduled that one of each basic teacher's classes spends the first half of the 3-hour morning and the first half of the 2-hour afternoon with her, while her other class spends the latter half of the morning and the latter half of the afternoon with this teacher. The special teachers, to whose rooms the pupils go at scheduled periods during the half of the day not spent with the basic teacher, are all present. They include the librarian and teachers of science, social studies, fine arts, music, and manual arts. Also present is one of the two instructors in physical education, who take turns supervising the playground before school. A teacher who specializes in giving individualized instruction to poor readers and the part-time school psychologist, who is present 3 days in the week, complete the conference group.

Each of the basic teachers presents two or three pupils for discussion, at least one from each of her classes. In the course of the Tuesdays of the year, she is able to present every child at least once. Generally the cases chosen for report on a particular Tuesday will be the two or three pupils next following in the class list the pupils discussed at the previous Tuesday conference. However, if for any reason a particular pupil's situation seems to warrant discussion at any time, he may be put ahead on the list. A copy of the list of pupils to be discussed at any week's conference is made available to all teachers in advance.

In preparing the case of a particular pupil for presentation at a teacher conference, the basic teacher turns to her file of cumulative folders. In each pupil's cumulative folder is to be found a variety of records, systematically maintained. The teacher will find cards on which are recorded the pupil's (1) health record, transcribed from the record kept in the medical office; (2) educational test record; (3) home report form, describing objectively the pupil's home situation when visited by a member of the school staff; (4) permanent record of educational achievement and promotion; and (5) other miscellaneous records. Miscellaneous records may include reports of special interviews with the school psychologist or psychiatrist, notes on conferences with parents, and reports of previous consideration of the pupil's case in teachers' conferences.

In summarizing the pupil's case for presentation, the basic teacher is aided by two forms known as a Pupil Information Sheet and a Teacher's Check Sheet. The former provides space for the pupil's classification group, several lines for enumerating and describing the pupil's subject difficulties, other lines for brief statement of implications for the present situation of previous conference reports or clinical reports of psychologist or psychiatrist, smaller space for describing the pupil's home background and his health as they affect his present situation, and space for noting other material in the folder that is relevant to the discussion. Significantly, this sheet also provides space for recording recommendations of the conference, and follow-up by the basic teacher, with dates. The Teacher's Check Sheet is a checklist of problems and personality traits that the teacher may check in the course of her preparation of the pupil's case. It not only serves as a guide in preparing the Pupil Information Sheet, but provides descriptive terms helpful in making an accurate, condensed report to the conference.

The foregoing, especially the description of the Pupil Information Sheet, indicates the place of the cumulative record in the elementary school program of this school system. Its practical use is of greater concern and is not to be assumed to flow entirely from the mechanical features of the forms and processes, although it is greatly facilitated thereby. Experienced personnel workers know that checklists and forms can mean nothing in the hands of persons to whom the descriptive terms are merely verbalized trait concepts or who have a limited view of the individual pupil as an unfilled receptacle for knowledge. The pupil can be helped only as he is understood. The writer can testify as an outsider that the records are not only used, but useful. The individual pupils discussed come alive—the not-quite-spoiled little girl of an indulgent mother, who lives some distance from the nearest prospective playmates; the boy who was a happy, well-received leader of his group until caught because of his origins in the fierce eddies of child hate generated by the present world conflict. The rapid-fire comments and constructive suggestions in these and other less dramatic cases reveal not only experience with the forms and methods, but a mental hygiene point of view on the part of the teachers which enables them to turn their systematic procedures to good use in furthering the development of individual pupils.

Each pupil discussed has been observed recently by eight or more of the participating teachers. This is a unique good feature of the type of elementary school organization employed in this school. But it seems fairer to say that the conference use of cumulative records is basic to the success of the program as organized than to argue that

the form of organization is basic to the teacher conference use of records. In most school systems of comparable size will be found many of the special teachers found here. There would be no bar, in a system where the classroom teacher takes responsibility for more of her pupils' activities, to including in a conference the classroom teachers of the immediately preceding grade. In this way an additional point of view would be made available in each case, a point of view that would bring a unique perspective resulting from primary responsibility for the pupil's development at a time in the past and an intervening period of greater concern with other children.

At the close of the same school day, at 3 p. m., we find a teacher conference in session in the junior-senior high school. The home-room teachers of pupils in the eleventh and twelfth grades have assembled to discuss the social, personal, and academic development of several pupils. Special attention in the cases of these pupils is given to their vocational plans or lack thereof. In this conference, seven or eight different home-room teachers are prepared to present one case each. A few specialists are present. The principal presides. The superintendent of schools, the school psychologist, and the director of vocational guidance sit in.

Each pupil's case has been prepared with the same thoroughness and on the basis of the same types of records as in the elementary school situation just described. Pupils who have been in the system for several years are represented by rather full folders, telling a story of growth studied and influenced at every stage by the teacher conference method. Pupils new to the system may have relatively meager records. Cases include pupils with quite definite vocational plans, but with development of an effective personality still to be fully achieved; pupils well developed academically and socially, but with little plan and poor economic basis for further study; pupils who have learned to get by or who feel too little of the challenge of the school's curricular; a few pupils who are plainly marking time until freed of compulsory school attendance.

Opportunities for individual conference with the vocational counselor have been provided all pupils in these grades. Further vocational counsel, however, may be recommended. A rich program of extracurricular clubs and intramural and interscholastic athletics provides a natural basis for personality and character development. Those who do not find their places in these activities may be guided into them. Expansion, reduction, or shift of courses may be recommended as adaptations for those not properly stimulated by the work of current courses. Seriously maladjusted pupils may be referred to the psychologist or psychiatrist. Poor general health may affect the lives of a few and warrant referring them to the medical staff.

Cumulative records provide the historical background against which current status of a pupil may be judged. The wealth of this information on the great variety of counts—vocational, social, scholastic, economic, physical, psychological—presents a full picture not to be gained from unrelated data. The teacher responsible for a case presents a summary of the information about a pupil and suggests remedial action. Recommendations and referrals are generally made quickly and for clear causes. Occasional new features in a case call for longer discussion.

In all, a program of pupil guidance has been achieved. No small amount of the strength of the program must be ascribed to the availability of psychological and psychiatric service, not only for referral of pupils, but for consultation by teachers. A good program of home visiting, a strong extracurricular program, good educational guidance at the junior high school level, a well-conceived program of vocational orientation and counseling, stimulating teaching, wholesomely sympathetic basic teachers in the elementary school and homeroom teachers in the secondary school, all play a part and jointly testify to educational leadership of a high order.

The teacher conference based on cumulative records is a basic contributing technique in a broadly conceived educational program. Its peculiar contribution is its emphasis on systematically appraising the school's effect on each pupil as an individual. Each pupil is canvassed regularly. The psychologist will approve this especially as a promise that the withdrawing personality will be detected early, instead of late. The pupil's own systematic record provides the complete picture of growth necessary to make the proposals for action at systematic intervals a scientific, helpful procedure.

A bibliography of descriptive material about the teacher conference program just discussed follows:

CHAPMAN, PAUL W. *Guidance Programs for Rural High Schools*, Washington, U. S. Government Printing Office, 1939. (U. S. Office of Education, Vocational Division Bulletin No. 203.)

A full account of the program, including sample record forms, for the secondary school level.

MILLER, L. M., and MACCALMAN, K. R. *A Plan of Integrated Guidance*. New York State Education, June 1939.

Describes the program in elementary as well as secondary school.

STRANG, RUTH. *Three Phases of Guidance in the High School*. *School and Society*, 54: 357-61, Oct. 25, 1941.

A description of three high-school programs, including the one just discussed, with special emphasis on use of cumulative records.

VALUES OF PUPIL PARTICIPATION IN RECORD-KEEPING

In the progress that has been made in adapting cumulative records to a variety of useful purposes, there has been a growing acceptance of the fact that the primary object and focus of record-keeping must be the individual pupil and his all-round development. The individual cumulative folder is met more and more frequently in all kinds of schools. Much less common is direct pupil participation in the maintenance and use of such records. This is well, for there is much to be lost by careless adoption of slogans and practices on a large scale simply because of their prima facie appearance of according with general principles of learning and child development. Nevertheless, it is helpful to consider an example of extensive pupil participation in the record-keeping process and its implications for a variety of aspects of the use of cumulative records in the schools.

In one 8-grade pupils elementary school with a clientele of 230, a distinctive feature is that the pupils are encouraged to take an active part in planning and administering their school life to the limits of their ability. The operation of the student government transcends in reality and effectiveness similar organizations in other schools where all too often the formalities of parliamentary procedure are carried out without conviction by pupils who still look to the school administration for direction in all but the most trivial matters.

A counterpart of this freedom in student government is found in the general attitude of the faculty toward pupils in relation to their scholastic progress. Pupils are treated so far as possible as persons capable of an intelligent interest in their own scholastic development.

To measure and guide scholastic progress, this school employs a number of standardized tests of a diagnostic or semi-diagnostic type: The Gates Silent Reading Tests, the Brueckner Diagnostic Arithmetic Tests, the Analytical Scales of Attainment in Arithmetic, and others. In spelling, the "100 spelling demons" are used. In penmanship and composition two and four samples a year, respectively, are judged against standard scales for evidence of progress. Achievement batteries are used annually.

Teachers keep systematic records of pupil achievement on these tests beginning with grade 3. They transfer each pupil's scores to graph paper and add his performance at successive testings to his graph for each skill. Each pupil's folder, containing test booklets, record sheets, and graphs, is kept in a file at the front of the room for convenient reference. From the beginning, pupils are shown their progress as recorded on their charts and are encouraged as soon as able to take over the work of entering new data on them.

A Reading Guidance Record is maintained on a commercially published card. Pupils can master this type of recording at an early date, are pleased to do so, and thus aid in maintaining a complete record which may be evaluated at intervals for evidence of progress in quality and variety of reading being done.

Other records kept in a pupil's cumulative folder include the customary permanent record card, a child-study card of character ratings on approximately 20 traits by successive teachers, a project record card showing in what individual and group projects the pupil has participated and whether and how well he has finished what he started, a log book recording significant anecdotes and experiences in the pupil's school life, and a copy of the quarterly home report booklet. These additional records are not available to the pupil—in fact, he does not know of their existence—but they are available to the teacher to guide her in the home reporting procedure which draws on the total record of pupil growth.

The quarterly home report is filled out by teacher and pupil in individual conference or in small groups. The individual pupil thus gains experience in objectivity concerning his own behavior and in planning corrective action. He also acquires a diagnostic and remedial attitude toward his own scholastic progress. Periodic reconsideration of his scholastic progress reenforces the diagnostic effect of his original contact with the graphing of his test results. The principal notes there is observable evidence of greater pupil motivation achieved by this process than was accomplished when the communication sent home was entirely a matter of report from teacher to parent.

Not only is the pupil motivated by conference over his record and home report but teachers also report finding these conferences helpful in building rapport with their pupils and in guiding their own immediate action with respect to individual pupils. Through the device of conferences on preparation of reports, the regularity of report periods operates as a reminder to the teacher of the existence of each pupil as a growing individual with his own problems in a way that mulling over a record could never do.

Pupil participation aids in securing better understanding by the home of the pupil and of the school's efforts in his behalf. The principal reports that the parents are much impressed at the time of the annual school exhibition by the pupil-made graphs of their own educational progress. Moreover, it is a natural step from the pupil-teacher conference about the home report to a type of parent-teacher conference in which the pupil acts as an interested participant. Parents of children in this school were consulted in the framing of report forms and have an obvious interest in the use to which the report can be put. The pupil not only contributes to the home report and obtains

satisfaction therefrom, but is the interpreter of this report to the parents and a logically interested participant in the parent-teacher conference process.

A systematic cumulative record procedure lies at the foundation of the relationships described. Many schools may achieve a rapport on the basis of less systematic or complete record systems; on the other hand, a school with so elaborate and complete a system of testing, recording, and home reporting might easily lose sight of individuals in preoccupation with some of the details of record-keeping. The fact remains that in this school the procedure serves a fruitful end. Recording takes time and clerical ability, but, as the principal points out, the teachers find each feature of the record so important and meaningful that they wish to eliminate nothing, while the pupils find in participation in the record-keeping process an incentive not otherwise obtainable.

Another example of pupil participation in record-keeping may be found in the field of health education. In high school it is particularly appropriate that pupils assume responsibility for maintaining the best health possible for them. To assist them in their own efforts to develop health, strength, and endurance, several committees delegated to prepare manuals on physical fitness through physical education and health education prepared a simple war citizenship record which would guide pupils' progress along the following lines:

1. Body fundamentals: Strength, endurance, and body control.
2. Recreational skills: Swimming, individual or dual sports, team games, rhythmic.
3. Health as indicated by freedom from remedial defects of teeth, eyes, and other defects discovered in dental and medical examinations; days lost because of accidents and illness; immunization; knowledge and practice of nutrition; ability to relax; ability to plan and follow the best daily routine possible in wartime.
4. Service in the community.
5. Goals and purposes.

The last item is included for the purpose of encouraging each pupil to consider from time to time what he really wants most and whether he is making progress toward this goal.

It is most important that a record of this kind should not be used in any way to mark or grade the pupil or to admit a pupil to membership in any group. He should understand that the record is solely for the purpose of helping him to assume as fully as possible responsibility for his health, strength, and endurance. He should be encouraged, however, to confer with his adviser at least once a semester with respect to his progress and entire plans.

APPENDIX

ILLUSTRATIONS OF CUMULATIVE RECORDS

The cumulative record blanks reproduced here were sent to the U. S. Office of Education in connection with the study reported in chapter I. There were a great many excellent samples, but limitations of space make it possible to include only a few of them. Therefore, even though the school systems whose reports are reproduced, are identified, it does not mean that these are the only school systems having excellent cumulative records or that other school systems might not be using identical cumulative record systems.

Special record cards for follow-up and employment are given in chapter VIII.

Sample No. 1—New Britain, Conn.—a kindergarten-through-twelfth-grade record—consists of an envelope and three cards. The record is shown in seven figures.

Sample No. 2—Hamilton County, Ohio (also used in many other schools of Ohio)—a first-grade-through-twelfth-grade record—consists of a folder in which other data about the pupil can be preserved. The record is shown in four figures.

Sample No. 3—North Carolina State Cumulative Record—used in many of the schools of North Carolina, a first-grade-through-twelfth-grade record—consists of a folder in which other data about the pupil can be preserved. The record is shown in four figures.

[illegible]

Figure 9

[illegible]

Figure 11

SENIOR HIGH SCHOOL RECORD (Gr. 10-11)

School	School Year 10										School Year 11										Special Ability, Educational or Occupational Recommendation by H. R. Teacher, Counselor or Director of Guidance	
	MARKS					No. Periods	No. Weeks	H. R. Report	H. R. Grade	H. R. Teacher	MARKS					No. Periods	No. Weeks	H. R. Report	H. R. Grade	H. R. Teacher		
	1st Sem.	2nd Sem.	1st Sem.	2nd Sem.	1st Sem.						2nd Sem.	1st Sem.	2nd Sem.	1st Sem.	2nd Sem.							1st Sem.
SCHOOL	English										English	English										English
	H. R. Teacher											H. R. Teacher										
SCHOOL	Mathematics										Mathematics	Mathematics										Mathematics
	H. R. Teacher											H. R. Teacher										
SCHOOL	Science										Science	Science										Science
	H. R. Teacher											H. R. Teacher										
SCHOOL	History										History	History										History
	H. R. Teacher											H. R. Teacher										
SCHOOL	Physical Education										Physical Education	Physical Education										Physical Education
	H. R. Teacher											H. R. Teacher										
SCHOOL	Art										Art	Art										Art
	H. R. Teacher											H. R. Teacher										
SCHOOL	Music										Music	Music										Music
	H. R. Teacher											H. R. Teacher										
SCHOOL	Foreign Languages										Foreign Languages	Foreign Languages										Foreign Languages
	H. R. Teacher											H. R. Teacher										
SCHOOL	Electives										Electives	Electives										Electives
	H. R. Teacher											H. R. Teacher										
SCHOOL	Total Credits										Total Credits	Total Credits										Total Credits
	H. R. Teacher											H. R. Teacher										

JUNIOR HIGH SCHOOL RECORD (Gr. 7-9)

School	School Year 10										School Year 11										Special Ability, Educational or Occupational Recommendation by H. R. Teacher, Counselor or Director of Guidance	
	MARKS					No. Periods	No. Weeks	H. R. Report	H. R. Grade	H. R. Teacher	MARKS					No. Periods	No. Weeks	H. R. Report	H. R. Grade	H. R. Teacher		
	1st Sem.	2nd Sem.	1st Sem.	2nd Sem.	1st Sem.						2nd Sem.	1st Sem.	2nd Sem.	1st Sem.	2nd Sem.							1st Sem.
SCHOOL	English										English	English										English
	H. R. Teacher											H. R. Teacher										
SCHOOL	Mathematics										Mathematics	Mathematics										Mathematics
	H. R. Teacher											H. R. Teacher										
SCHOOL	Science										Science	Science										Science
	H. R. Teacher											H. R. Teacher										
SCHOOL	History										History	History										History
	H. R. Teacher											H. R. Teacher										
SCHOOL	Physical Education										Physical Education	Physical Education										Physical Education
	H. R. Teacher											H. R. Teacher										
SCHOOL	Art										Art	Art										Art
	H. R. Teacher											H. R. Teacher										
SCHOOL	Music										Music	Music										Music
	H. R. Teacher											H. R. Teacher										
SCHOOL	Foreign Languages										Foreign Languages	Foreign Languages										Foreign Languages
	H. R. Teacher											H. R. Teacher										
SCHOOL	Electives										Electives	Electives										Electives
	H. R. Teacher											H. R. Teacher										
SCHOOL	Total Credits										Total Credits	Total Credits										Total Credits
	H. R. Teacher											H. R. Teacher										

Figure 16

99

[illegible]

Disease	Date	Disease	Date	Immunization	Remarks
Scarlet Fever		Diphtheria		swallow	
Measles		Smallpox		Diphtheria	
Parasitosis		Typhoid		Diphtheria Solid neg.	
Typhoid		Hematemesis		Diphtheria Solid pos.	
Scarlet		Whooping Cough		Scarlet Fever	
Scarlet		Chloroform		Scarlet Fever Dark pos.	
Scarlet		Convulsion		Scarlet Fever Thick pos.	
Polio-myelitis					

NOTE: If desired the state approved health card may be used if included on this order. Instead of making

Figure 17

[illegible]

Figure 18

XII. SCHOOL PHYSICAL EXAMINATION:

Figure 20

Figure 20

Figure 21

635-40-3M

Figure 22

APPENDIX

XVI. COUNSELOR'S NOTES				
Date	Teacher or Counselor	OBSERVATIONS, SUGGESTIONS, RECOMMENDATIONS AND SPECIAL INTERESTS	FOLLOW-UP	Date
Gr. 1				
Gr. 2				
Gr. 3				
Gr. 4				
Gr. 5				
Gr. 6				
Gr. 7				
Gr. 8				
Gr. 9				
Gr. 10				
Gr. 11				
Gr. 12				

Figure 23

**United States
Government Printing Office
Washington : 1945**

**For sale by the Superintendent of Documents, U. S. Government Printing Office
Washington 25, D. C. - Price 20 cents**